Pre-meeting checklist

It's important to us that you're comfortable during your meeting. We want to get to know you and you'll want to get to know us too. So feel free to ask all the questions you want. Here are some suggestions to help you prepare.

What to think about

Before you discuss the solutions associated with a plan of action, you need to think about what you want.

- What's important to you today? Family? Friends? Hobbies? Your career? Your church or a favorite charity?
- Do you feel comfortable about your current financial situation? How about the future?
- What would you like to do when you're retired? What kind of legacy do you want to leave?

What to bring

- A list of any questions you have regarding your current financial situation.
- Information on your investments, IRA, 401(k) etc.
- Information on insurance – life, disability and long-term care.
- A list of future dreams and financial goals you would like to achieve, including both short- and long-term goals.

What to ask the advisor?

- How long have you been an investment consultant?
- How did you originally become interested in becoming an investment consultant?
- What do you enjoy most about being an investment consultant?
- What type of clients do you tend to work with?
- What is your fee structure? How do you get compensated?
- How often will we be meeting in the future?

What to expect

While every client meeting is unique, during the first meeting we'll generally:

- Identify your goals and any financial concerns you may have
- Explain the planning process
- Share our investment approach