

# HOW TO PREPARE FOR YOUR DISCOVERY MEETING.

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MEETING WITH A FINANCIAL ADVISOR FOR THE FIRST TIME CAN BE A LITTLE OVERWHELMING, WHICH IS WHY WE'VE ASSEMBLED A LIST OF HELPFUL HINTS TO HELP YOU GET ORGANIZED BEFORE OUR INITIAL MEETING. THIS SHOULD NOT BE VIEWED AS HOMEWORK OR A REQUIREMENT, BUT SIMPLY A RESOURCE TO HELP MAXIMIZE YOUR TIME:



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## Create a list of your debt, including



- Approximate principal balances
- Interest rates
- Payment schedules
- Expected payoff period

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## PRINT AND BRING A RECENT COPY OF YOUR:

- 401(k) statement with value and distribution/allocations of funds
- Other various retirement accounts
- Investment accounts
- Checking accounts
- Savings account
- Any other accounts
- IRAS
- Insurance statements including benefit amount



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## CLIENT/ADVISOR RELATIONSHIPS ARE IMPORTANT TO US.

We want you to feel comfortable letting us manage your goals and finances, In this Discovery Meeting we want the topic to be based on your needs and how you'd like them met.



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DOCUMENT YOUR GOALS AND BE PREPARED TO DISCUSS THEM WITH US. HAVING THESE GOALS IN MIND WILL ASSIST YOUR ADVISOR IN MAKING APPROPRIATE RECOMMENDATIONS FOR YOU. CONSIDER YOUR LONG-TERM AND SHORT-TERM FINANCIAL GOALS – WHERE DO YOU WANT TO BE IN 5 YEARS, 10 YEARS, ETC.? LIKE WE SAID THIS IS NOT A REQUIREMENT BUT IT MAY HELP US HELP YOU.