Sherman

WEALTH MANAGEMENT

CHECKLIST

Financial Planning Meeting Preparation

Your Financial Concierge™

CHECKLIST

Meeting Preparation

CONTACT INFORMATION

Primary Email Address:
Primary Phone Number:
Preferred Method of Contact:
Date of Birth:

PERSONAL INTERESTS/HOBBIES

Ex. family, travel, work, charitable giving, friends, sports, art, etc.

FINANCIAL VALUES

The importance of money to you. Ex. family, financial security to comfortably support lifestyle/independence/freedom.

GOALS

What are your financial goals? Some examples provided below.

- Short Term (0-18 mo) | Intermediate (18 mo - 4 yrs) | Long Term (4+ yrs)
- Examples of goals: retirement, children's education, new car, emergency fund, other taxable investments?

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STATEMENTS

Please gather the following statements (if applicable).

- [ ] W2/1099 or income information/tax returns
- [ ] Loans, mortgages or other debt infomation (recent cc statements, student loans)
- [ ] Investment accounts (retirement, investments, etc.)
- [ ] Bank accounts
- [ ] Insurance policies

MONTHLY LIVING EXPENSES

Give as much detail as possible.

OTHER EXPENSES

Ex. vacation, house renovation, big purchases coming up, etc.

ADDITIONAL INFORMATION

Please provide contact information for the following (if applicable).

Attorney/Estate Planning Attorney:
Accountant:
Insurance Professional:

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- [ ] Yes
- [ ] No