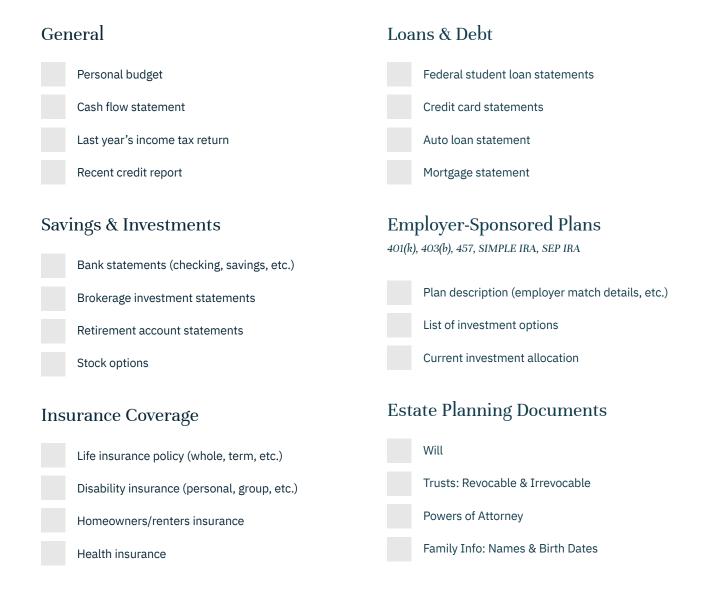


sh Initial Meeting Checklist

Financial planning is a powerful tool that can be used to build your personalized roadmap toward a secure, successful future. During our initial meeting, my objective is to better understand the intricacies of your financial life. Working together, we can develop a series of thoughtful and well-crafted strategies to help you reach the financial goals that are most important to you.

To make the most of our conversation, I encourage you to review the following list of financial documents and bring applicable copies of each to our meeting.



Questions about some of the documents on this checklist? Unsure of whether they apply to you? Give me a call to discuss prior to our meeting.