

**INITIAL MEETING PREPARATION**

To help ensure that your questions and concerns are addressed as efficiently as possible, please review the following and make notes to discuss at our first meeting.

1. What are your top financially related concerns:

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2. Summarize your experiences with investing, financial decisions, planning.

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3. What are your current investments, savings and other assets?

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4. Who have you consulted with in your financial decisions? Where do you get your ideas/information now?

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5. What would you like to accomplish through the Consulting Service?

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