desert FINANCIAL
WEALTH MANAGEMENT

Wealth Management - Suggested Items

Things to consider for your financial advisor meeting

- We will discuss how we are able to provide personalized guidance and develop a strategy to help you meet your goals.
- Learn how we can help with Retirement Planning, Investment Management, Financial Goal Planning, Asset Protection Strategies, Legacy Planning, and more.
- $25,000 Investable Asset Minimum

Things to consider bringing with you, if available and applicable

☐ Statements for existing bank and investment accounts

☐ Statements for existing 401(k) or retirement plans

☐ A copy of existing estate planning documents (i.e. Trust documents)

☐ A copy of existing life insurance and/or long term care policies

☐ A copy of existing Financial Plan