



## 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

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