What's Next...

Phase 1: Financial X-Ray

What's Next... What should I bring?

During our next meeting, our first step will be to gather information that will be helpful in familarizing us with your particular situation. Therefore, it will be helpful for you to have available:

1. **Copies of wills, trusts, powers of attorney, and any legal documents.**
2. **Copies of insurance policies (life, health, auto & home).**
3. **Copies of investment statements, bank statements, social security statements, etc.**
4. **Copies of last year's tax return (and possibly a balance sheet or financial statment).**
5. **A basic guess by you of your annual expenses.**

Please note that if you do not have these items available or if it is difficult to obtain this inforamtion you can simply give us a rough estimate, but keep in mind the better the information your provide the more accurate your plan will be.

All information is kept strictly confidential; it is not disseminated or distributed in any shape or form. Once we have completed your financial x-ray we will move onto phase two and start working on your personalized financial plan and provide you with clear next steps so you will know exactly how to move forward with absolute clarity, security, and confidence about your financial future.

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