THE ATHENA FINANCIAL GROUP

First Meeting Checklist

A SUCCESSFUL FINANCIAL PLANNING RELATIONSHIP IS BASED ON UNDERSTANDING. USE THIS CHECKLIST TO THINK ABOUT YOUR GOALS AND PREPARE FOR A GREAT FIRST MEETING.

Please bring the following to your meeting:

- Pay Stubs
- Tax Returns
- Benefit Booklets
- Insurance Statements
- Investment Statements

What do you value most in a professional partnership?

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Why do you want to work with a financial planner?

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Do you have any specific financial goals or challenges you are looking to address?

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Are there specific financial topics you consider most urgent at this time? Check all that apply.

- Goal identification & clarification
- Determining net worth
- Preparing cash flow
- Analysis of tax returns / reducing tax liability
- College funding for children or grandchildren
- Comprehensive investment management
- Estate and/or charitable planning
- Reviewing risk management (life, long-term care, property and casualty insurance)
- Preparing future generations for wealth management
- Financial independence review or retirement income analysis
- Coordination with multiple advisors (CPA, attorney, etc.)
- Outside account management
- Other: ______________________________

Questions? Write them down here

Notes