Introduction Meeting

Your first appointment is our "Get to know each other meeting." It's a great way for us to get to know you on a personal level and vice versa. The purpose of this meeting is to get perfectly clear on your financial goals and concerns.

Our conversation during this meeting, along with the documents you provide, will guide our analysis and result in answers to the three critical questions:

1.) Are you on track to reach your long-term goals (e.g. retirement, or work-optional)?
2.) Are there areas in your financial life where money can be saved i.e. taxes and investments
3.) How can your investments be improved?

When discussing your investments bring the following documents to the meeting.

- Retirement Plan Statements (i.e. IRA, 401(k), 403(b), 457,etc.)
- All Other Investment Account Statements
- Current year gross income estimates

Optional items

- Last Two Years Tax Returns (Form 1040)
- Social Security Statements

Here is a Quick Overview of Our Agenda:

- Your current situation, where you are at and what you are wanting to accomplish
- My background, philosophy and what we believe in
- How we get paid
- Our investment management process
- What we do for you
- Technology
- Review your documents
- Answer all of your questions

I look forward to getting to know you,

Jacob Deschenes
Investment Advisor and Portfolio Manager

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