Welcome to TrueWealth Advisors. Thank you for reaching out to to discuss your financial plan. Anytime we are considered as a potential advisor, it is a very gratifying experience.

We normally meet with new clients for about an hour at our office to see how we can meet their needs. We don't charge for our initial visit, and we often help people evaluate their strategies such as investments, retirement withdrawals, insurance, and income taxes. Most importantly, we help you implement your plan, and we manage investments to meet your needs. Here are some examples of the kinds of things we'll talk about:

Today: What are your top priorities and goals?

Future: What plans have you made for the future? What values impact your views about the future?

Concerns: What kinds of financial issues keep you up at night? What are the biggest financial mistakes you've made or avoided?

Family: Who else in your family will be impacted by the plans we put in place? What ways would you like to financially help your family?

Legacy: How would you like others to remember you?

Health: What concerns you about either your health or the health of your spouse or family?

Risk: How much money would you need to lose before you abandoned your plan?

Your answers to these questions will guide us to the next step: building a plan to lead you to your desired future. Your life is unique, so your financial plan should be too.

Our collaborative team-based approach puts you at the center of your future, helping you gain greater clarity of your life goals and challenges.

Building that plan will likely require some financial information and related documents. We'll provide you a specific list after our next meeting but some of that information may include the items on the attached Financial Document Checklist. Further, we have included instructions for securely sending documents to us.

We have attached a piece describing our TrueWealth Planning Portal® (where you can access your updated plan everyday) as well as a "risk profile" questionnaire. Please answer these questions and the attached data form and bring them to our first meeting.

You can learn more about our business and experience at www.truewealthllc.com.

We look forward to our continued partnership in your long-term success.

Sincerely,

Paul Marks CFP®, CRPS®, Jason Sims, and Van Sievers CFP®, CPA

TRUEWEALTH ADVISORS, LLC
ADVICE WITH A HIGHER PURPOSE