



## LAURA MOSSAKOWSKI, LLC

FINANCIAL PLANNING FOR WOMEN AND THEIR FAMILIES

2555 Continental Court, Ste 4, Green Bay, WI 54311

### Upcoming Review Agenda

**Client Name(s):** \_\_\_\_\_ **Date:** \_\_\_\_\_

Please take a moment to look over the following discussion points. If you have experienced any changes or updates please let us know below. The following is to assist us in better addressing your current and future goals.

#### Personal Finances

Please list the current balances in your accounts that are not held through us:

Work Retirement (401K, 403B, ESOP, etc.) \$ \_\_\_\_\_, Savings \$ \_\_\_\_\_, Checking \$ \_\_\_\_\_, Other \$ \_\_\_\_\_

#### Personal Information Updates

Check any life events we should be aware of and date them as appropriate: (may include but not limited to the following)

- Estate planning changes \_\_\_\_\_
- Beneficiary changes \_\_\_\_\_
- Major expenditures/upcoming purchases \_\_\_\_\_
- Money to invest/withdraw/reallocate \_\_\_\_\_
- Change in Employment status \_\_\_\_\_
- Change in income/tax bracket (please bring your tax return along) \_\_\_\_\_
- Change in address/sold or bought a property/real estate \_\_\_\_\_
- Change in email address/phone number \_\_\_\_\_
- Change in marital status \_\_\_\_\_
- Expecting or Birth of a child or grandchild \_\_\_\_\_
- Death in family \_\_\_\_\_
- Change in health status \_\_\_\_\_
- Other \_\_\_\_\_

#### Open Discussion

What is most important (financially) to you at this time?

Retirement \_\_\_\_\_ College \_\_\_\_\_ Buying a Home \_\_\_\_\_ Paying off Debt \_\_\_\_\_

Wealth Accumulation \_\_\_\_\_ Building your emergency fund \_\_\_\_\_

Other \_\_\_\_\_

New or existing concerns? \_\_\_\_\_

New goals/expectations?

5 years \_\_\_\_\_

10+ years \_\_\_\_\_