FIRST MEETING

DELMARVA
FINANCIAL GROUP

The first meeting is really about getting to know each other. We want to make sure we have a good fit. We will discuss your goals, aspirations and where you are financially. This meeting forms the basis of any plans we create to help you strive for your goals.

Your first meeting is complimentary.

Before our meeting, identify what financial and lifestyle goals you wish to discuss. To make the most out of our time together please bring some documentation to our first meeting.

WHAT TO HAVE READY

- Most recent pay stub(s) from all employers
- Most recent Social Security statement
- A copy of your company's retirement benefits plan
- Bank Statements/CDs
- A copy of your defined benefit pension plan
- Insurance policies (life, health, disability, long-term care, etc.)
- Investment statements (mutual funds, brokerage accounts, annuities, etc.)
- A list of typical monthly living expenses
- Most recent tax return
- Liability statements (mortgage, auto, student loan, credit card, etc.)

WHAT'S NEXT

- ✓ We agree the time is right, engage in a working relationship and arrange a second meeting to review a more formal proposal.
- ✓ We both agree the time is not right to work together.

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