Park Square

Wealth Management Review

Wealth Management Review

- What's on your mind?
- Evaluate planning goals and progress toward them. Review portfolio performance and determine if you're on track to meeting previously established goals.
- Review asset allocation and selected investments.
- Review the state of the markets and economy since the last review. Discuss any key events or changes that may affect your plan.
- Review any life events or changes that would require changes to your plan
- Answer your questions, address any concerns.

How to prepare for our meeting

During our meeting, we will discuss your investment plan, your progress toward your goals, and any personal or financial changes that may have taken place since our last meeting. Please take a moment to consider the questions below before we meet. Also, if your personal or financial situation has changed since we last met, please bring with you any documents related to those changes.

Questions concerning your investment goals:

- Are there any adjustments to your goals, or do you have new goals or previous goals that may no longer be important?
- Do you have questions related to your investment plan, including asset allocation or plan management?
- Are there any questions you'd like to discuss that are related to the market, the economy, specific investments, or asset classes?
- Have you had any changes to your income, expenses, spending needs, or your ability to save or repay debt?

Questions concerning your personal goals:

- Have you experienced family changes such as a birth, death, marriage, or health changes?
- Have you received additional income or assets such as an inheritance or bonus?
- Have you paid off any significant loans or eliminated any expenses?
- Have you purchased new financial products such as insurance or investments, or opened new accounts?

Will you recommend me?

I trust that you are happy with the [specific services] I provide. Would you be willing to recommend me to a friend, colleague, or family member who might benefit from my approach to wealth management?

Disclosures