

How to Prepare For Your Appointment

The more we know, the more we understand. The financial planning process is not a one-way, cookie-cutter type of approach. We have no preconceived ideas about the outcome of the meeting. Our job is to come fully prepared to listen in detail and to begin to develop a relationship. We ask that you also prepare for the meeting by collecting the following information:

What to Bring:

- Statements from existing accounts (bank, brokerage, 401 (k), etc.)
- Insurance information (policy amounts, types, statements)
- Employer benefit outline (insurance, pension, etc.)
- Recent paystub
- Recent Social Security statement, if available
- Current Estate Plan documents
- Any additional questions

We look forward to seeing you soon. Please contact us if you have any questions at 619-295-9930 or team@lumenafinancial.com.

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