SYMMETRY FINANCIAL PARTNERS

PREPARING FOR YOUR APPOINTMENT IS ESSENTIAL TO HELPING US CRAFT A PLAN THAT'S RIGHT FOR YOU

MEET YOUR ADVISOR

Robert Toczylowski CFP®, CPFA®

8115 Maple Lawn Blvd. Suite 350
Fulton, MD 20759

4445 Willard Ave. Suite 600
Chevy Chase, MD 20815

For more information, call
1-888-350-9727 or visit
www.symmetryfp.com

CHECKLIST

Gather Documentation	❑	Recent Pay Slips for all potential account holders
	❑	Existing financial account statements (from banks, other investment providers, and employer 401(k)s)
	❑	Loan and credit card statements
	❑	Insurance policies/statements
	❑	Information related to your current investments
	❑	Any other personal budget information (e.g. assets and liabilites)
Essential Information	❑	Age
	❑	Income (Current, Family, Future (including inheritances))
	❑	Day-to-day expenses, future expenses
	❑	Tax paid and tax owed
	❑	Family circumstances, including the number and health of dependents and state of health
Ask Yourself the Right Questions	❑	What do you want to achieve financially and personally?
	❑	How soon do you want to achieve your goals?
	❑	When do you want to retire?
	❑	Are you, your family, and your lifestyle protected against the unexpected?