

MEET YOUR ADVISOR



Andrew E. Hickey III

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Securities and investment advisory services offered through Woodbury Financial Services, Inc., member FINRA and SIPC, and Registered Investment Advisors.

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

Checklist

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