SYMMETRY
FINANCIAL PARTNERS

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

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 liabilities)
Essential Information	❑ Age
	❑ Income (Current, Family, Future (including inheritances))
	❑ Day-to-day expenses, future expenses
	❑ Tax paid and taxed 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?