Sagewater Financial

# Thank you for choosing us.

We look forward to meeting with you and collaborating to help achieve the highest potential of your personal values and financial goals.

To provide the best possible financial advice, we need to understand your current financial situation and the areas in which we can be of service. Our initial consultation will involve collecting all relevant financial information.

To assist with this process, please bring the following items with you to our first meeting:

- Copy of current investment account statements
- Copy of most recent tax return
- Estimated annual or monthly budget
- Current savings contribution details
- Completed *Preliminary Client Questionnaire*

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