



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

### MEET YOUR ADVISOR



**Andrew E. Hickey III**

1997 Annapolis Exchange Pkwy., Suite 300  
Annapolis, MD 21401

For more information, call  
1-888-350-9727 or visit  
[www.symmetryfp.com](http://www.symmetryfp.com)

### 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?