Center for **Financial Planning**, Inc.®

Working with **The Center** is as simple as 1, 2, 3

* Get to **KNOW** you

You want to meet us, we want to understand how we can help you.

- ☐ Setup initial meeting
- ☐ Organize your thoughts with the First Meeting Guide
- ☐ Bring enclosed First Meeting Guide to initial meeting.
- ☐ Attend first meeting

COLLABORATE & Create

To sum it up, we work together. Each plan is unique because it's all about you.

- ☐ Collect information about your life
- ☐ Set financial plan scope of services and time-line
- ☐ Construct a financial plan that is all about you, your priorities and needs

LIVE your plan

Now that you've got a plan, we'll help you stay on course while you live your life.

- ☐ Implement recommendations as instructed by you
- ☐ Ongoing open communication about your life, the changing world and how we can assist
- ☐ Meet annually to update your plan and stay on course

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First Meeting Guide

A successful financial planning engagement is as much about knowing you and your needs as it is about dollars and cents. Here are some topics for you to think about as you prepare for your first meeting with Center for Financial Planning, Inc.

Do you have specific financial goals or challenges you are looking to address?

Why are you looking to work with a financial planner?

What do you value most in a professional partnership?

Are there particular financial topics you consider most urgent for your life right now?

- Goal identification & clarification
- Determining net worth
- Preparing cash flow
- Analysis of tax returns & working to reduce tax liability
- College funding for children & grandchildren
- Comprehensive investment management
- Estate and/or charitable planning
- Reviewing risk management (life, disability, long term care, property & casualty insurance)
- Preparing future generations for wealth management
- Financial independence review or retirement income analysis
- Coordinating with multiple advisors [i.e. CPA, attorney, etc]
- Implementing strategies

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First Meeting Guide

Questions? Jot them down here.

1.

2.

3.

4.

Notes

"You only live once, but if you **do it right**, once is **enough**."

Mae West