



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

 Get to **KNOW** you



**COLLABORATE & Create**



**LIVE** your plan



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

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

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



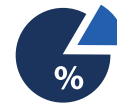
## First Meeting Guide

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.

### 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

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

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Why are you looking to work with a financial planner?

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What do you value most in a professional partnership?

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