

## DISCOVERY CALL RECAP - SAMPLE FAMILY MONTH 20XX

### FAMILY VALUES

High quality family time  
Debt aversion  
Generosity

### CURRENT GOALS WITH MONEY

Retirement eventually - not entirely sure when. Perhaps around age 60.  
Kids savings - have flexibility with options, not necessarily tied to college.  
Take extended family vacation - more than one week.

### WHAT YOU'RE LOOKING FOR IN AN ADVISOR

Someone to build an actual financial plan - not "sell an insurance product."  
Someone to guide on how much to be saving for retirement and where to be saving.  
Someone to give investment advice on how to be invested for different goals.

### WHAT FIDENT WOULD FOCUS ON RIGHT AWAY

Review current free cash flow  
Compile a complete net worth picture  
Discuss the most appropriate ways to be saving for various goals  
Run a flexible retirement projection with various scenarios  
Evaluate insurance needs and coverage (home/auto, life, liability, etc.)  
Do a current tax review and projected future tax liability comparison  
Discuss multiple kids' savings options  
Identify best ways to allocate cash-flow  
Review current investment and level of appropriateness

### ESTIMATED PLANNING FEE

\$3,500 - \$3,800

### CURRENT STATUS / NEXT STEPS

Will wait to hear back from you on when/if it makes sense to move forward.  
Added to weekly Fident Friday letter list

