FIDENT
FINANCIAL

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