First Meeting Checklist

Welcome to IFG!

IFG is an independent fee-only financial planning consultancy and a Registered Investment Advisor. This means IFG has fiduciary status by law for all services performed for clients. This standard requires that the client's best interests must be the sole criteria for all services and recommendations provided.

You Play a Critical Role

Planning your financial future begins with a look at your current financial picture. A review of your current situation is, after all, what an initial meeting is all about.

While there is NO CHARGE for our first meeting, in order that our visit can be meaningful and provide value, please be prepared to provide the following when we meet:

- Your most recent income tax return - Form 1040 with Schedules B and D, plus C or C-EZ if you report business income.
- A listing of all assets and liabilities
- The amount of money you will save and invest within retirement plans this year
- The amount of money you will save and invest outside of retirement plans this year
- Copies of the latest monthly statements for all investment accounts
- A list of all life insurance currently owned, as well as any group plans
- Wills, trusts, powers of attorney, if any (Not necessary at first meeting; but you should locate)
- Employee benefits information
- Your latest retirement plan statements, if applicable
- Be prepared to talk about any obligations you might have with regard to other family members such as parents or grandparents now and in the future
- Include a list of any expected cash windfalls such as inheritances, gifts, business successes, and invention or publishing royalties, etc., if any
- A prioritized list of all financial goals: short-term (next 12 months), intermediate (12 months to 5 years), and long-term (example: retirement, college funding, debt reduction, new home or second home purchase, etc.)

I look forward to our meeting and to helping you achieve your financial goals.

James Lorenzen, CFP®,
Accredited Investment Fiduciary®

The Independent Financial Group

A Registered Investment Advisor
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