Gmail **Jeff Price <tom.j.price@gmail.com>**

Creative Planning - Getting Started

Adam Hoopes <adam.hoopes@creativeplanning.com> Tue, Sep 6, 2022 at 10:44 AM
To: "tom.j.price@gmail.com" <tom.j.price@gmail.com>, "warwgn@outlook.com" <warwgn@outlook.com>

Jeff & Tom,

I am looking forward to meeting with you on Monday, 9/19 at 2:30pm in our office.

To give you a brief overview, the goal of this meeting will be to get me up to speed on your current financial situation as well as discuss your goals. We will create a financial plan together to create a framework of your financial status and to determine if we're on track to meet your goals. If you're able to send me any information ahead of time, our meeting will move a bit quicker as I'll be able to complete some work prior to our meeting and use our time to ask clarifying questions and understand your financial priorities.

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To make the best use of our time together, please have the below items compiled:

- Please complete the attached Investor Profile Questionnaire so that we have an understanding of your tolerance for risk.
- Current account balances for bank accounts (checking/savings), statements for investment accounts, retirement accounts (Traditional/Roth IRAs, current 401(k)/403(b)s, inactive 401(k) /403(b)s), etc.
- Information about any life insurance policies (term, death benefit, annual premium, net cash value of any whole/universal life policies)
- Current estimates of any pension benefits and Social Security benefits (at least the full retirement age benefit (66 or 67); this can be obtained online at: http://ssa.gov/myaccount/)
- Most recent tax return
- Amount you need on a monthly basis (today) to cover your monthly living/leisure expenses, and does that change down the road when you are retired/financially independent?

At the end of our meeting, we will schedule our follow up meeting to prepare and present our recommendations.

Adam

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Investor Profile Questionnaire v2.2.pdf
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