FURSTENAU FINANCIAL
FAITH, PATIENCE, DISCIPLINE

How to Prepare for Your Initial Consultation

Thank you for this opportunity to introduce myself to you.

Hiring a financial planner is an important decision in your life and must be built on a foundation of trust. I seek solely to build life-long relationships with my clients.

Generally, an initial consultation lasts sixty to ninety minutes. This confidential conversation is complimentary to you as we believe it is critical that you find a financial planning firm that not only listens well and asks the right questions; but one that you believe will meet (and hopefully exceed) your expectations.

During our meeting you can expect me to ask questions about your goals, dreams and aspirations. Please begin thinking about “what’s important to you” and how your quality of life could improve if “X”, “Y” and “Z” were addressed.

Your enclosed financial planning questionnaire has been designed to help you begin organizing quantitative components that impact your personal financial life. Please review the questionnaire carefully and complete the form, in advance of our initial meeting.

Please bring the following items with you;

1. Your most recent tax return
2. Current Investment, Insurance and Bank Statements
3. Employee Benefit booklet(s)
4. One Months Pay Stubs
5. Endorsement Pages for Life, Disability and Long Term Care (Nursing home) Insurance
6. Any Estate Planning Documents such as, Wills, Trusts, Powers of Attorney, etc.
7. Net Worth Statements (if you have one)
8. Social Security Statements

Thank you for taking the first step in the financial process. I look forward to building a long successful financial planning relationship with you.

Please contact me at your earliest convenience to schedule your complimentary initial consultation.

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