LEAHY WEALTH MANAGEMENT GROUP

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Initial Consultation Checklist

Since our time will be used to learn more about each other, the initial conversation is complimentary. Generally, initial consultations last about an hour.

During our conversation we'd like to learn more about you; your financials; your goals, and what you'd like to achieve by prospectively working with us. We'll also spend time discussing how Leahy Wealth Management Group works with clients, and answer any and all questions you may have.

It is helpful to provide **a summary of the items listed** below before our meeting. With this information we're often able to provide you with a dynamic financial snapshot on our wealth platform. If you're not able to provide all of the information we can still have a good meeting, so please do the best you can, but don't let this derail you. All items provided to us will be treated with strict **privacy, security, and confidentiality**.

Investments

- ☐ Brokerage Accounts
- ☐ Retirement Plans (401k, 403b, TSP, Pensions, etc.)
- ☐ IRA Accounts
- ☐ Other Investments (Property, Business Interests, Annuities, 529's, etc.)

Income and Budget

- ☐ Average annual income past several years
- ☐ Approximate total annual budget

Debt

- ☐ Mortgages, Home Equity Loans
- ☐ Other Debts

Asset Protection / Insurance

- ☐ Life Insurance Policies - Both Term and Permanent
- ☐ Disability, Liability, Long-Term Care

Estate Planning

- ☐ How long has it been since you updated your Wills, Trusts, Power of Attorney, Health Care Directives, etc
- ☐ Other Trusts (ILIT, QTIP, Inheritance Trusts, etc.)