WHAT TO EXPECT NEXT

Schedule your telephone interview. Call Carolyn at 239-687-3574. Following is information regarding the interview process. It is the first step in our relationship. As the quarterback of your financial situation and in order to give you sound advice at your complimentary session, we will review all of the topics listed below. This process can take place over the phone or in person according to your preference. It is important to have all requested items in front of you during the interview so that your analysis is as precise as possible. All information received during the interview will remain confidential. Our phone number is 239-687-3600 if you have any concerns or questions.

For the purpose of offering sound advice we will review the following categories:

I. Family Structure and Dynamics
   a. Children and Grandchildren, Spouses, Live-in Parents
   b. Relationships
   c. Health Status

II. Trust Information
   a. Date and Type of Trust
   b. Your Attorney
   c. What concerns you most about your Trust document

III. Current Advisors
   a. Financial Advisor
   b. Lawyer
   c. CPA / Tax Preparer
   d. Insurance Agent

IV. Business or Real Estate portfolios
   a. When property was purchased
   b. Current value and Basis value
   c. FL Domicile Information

V. Financial Information

a. Income and Expenses
b. Liquid Assets (Cash & Savings, Investments, Brokerage accounts)
c. Pension/ Retirement Assets (IRA, 401k, 403b, 401a, Roth)
d. Illiquid Assets (Inheritance, Land, Personal collections, Time shares)
e. Assets held outside your Estate

VI. Goals and Objectives

a. What is your greatest concern in the next 1-5 years
b. Who gives you your greatest concern
c. What have you done about either

VII. Checklist

_____Investment Statements

_____Business Tax Returns

_____Personal Tax Returns

_____Long Term Care Policies

_____Copy of your Living Trust

_____Insurance Policies and Statements

_____Retirement Plan Statement

_____Real Estate Information

Questions____
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*Please call SCH Financial at 239-687-3574 if you need any supporting documents. We can provide you with templates to track your budget and other tools to assist in preparing for your first meeting. And remember, a second look at your entire financial picture could save you and your family unnecessary hardship.

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*Remember a **Referral** is our best compliment*