In House Custom Financial Planning, Tax & Investment Management

J2 Capital makes available to all clients an online financial planning software. You will have the ability to update your plan in the software portal prior to our meeting or pre-fill out the enclosed financial profile.

Items to Bring

1. Copy of all latest investment statements. We will review current portfolio and allocation.

2. Copy of your latest income tax return. We will review your current tax situation.

3. Any online or financial plans you have completed in the past.

4. Be prepared to discuss the following:

    a. Desired retirement age.
    b. Is partial retirement an option?
    c. Will you be downsizing your home in retirement?
    d. Are there any children or parents that could be a potential financial burden to your retirement plans?
    e. Are there any post retirement fringe benefits for Health Insurance?
    f. Estate planning review and update.
    g. Any additional retirement goals or concerns.