Financial Steward Associates, LLC
planning, to enjoy the journey

Hello! and Welcome to Financial Steward Associates.

We are very pleased to be meeting with you on __________________________ at _________ .
In preparation for our meeting, we have a few items that we request you complete. If you have any questions at all, please do not hesitate to call.

Questions for your first meeting with Financial Steward Associates:

1. Why have you scheduled a consultation?

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2. What specific questions do you have?

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3. What will make this meeting successful for you?

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4. What are some of your financial and non-financial goals/dreams?

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5. If money were not an issue, what would your ideal lifestyle be? Where would you live? What would give you purpose and motivate you throughout the day?

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6. What is the number one issue you'd like help with right now?

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Documents to bring:

1. Statements for investment accounts, IRAs, annuities or company retirement plans – 401(k), profit sharing, etc.
2. Any other statement or document you may have a question about.

Thank you and we look forward to seeing you!