QUANTUM FINANCIAL PLANNING SERVICES, INC.

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What to Expect at Your First Meeting

First Meeting: Generally the initial consultation lasts 60 minutes. This confidential conversation is complimentary to you, as we believe it is critical that you find a planning firm that not only listens well and asks the right questions, but one that you believe will meet, and hopefully exceed, your expectations.

You do not need to bring anything to the initial meeting. However, if you have specific concerns or are interested in doing a Comprehensive Financial Plan, you may want to bring the following items:

Comprehensive Financial Plan Items

1. Your most recent tax return
2. Recent statements for financial accounts
   a. Checking, savings and CDs
   b. Money Market funds
   c. Mutual Funds
   d. Brokerage Accounts
   e. IRA and retirement and pension accounts
   f. Annuities
   g. List of EE Savings Bonds
3. Employee Benefits Booklets
4. Insurance policies
   a. Life
   b. Long-Term Care
   c. Disability
5. Estate planning Documents – Wills, Trusts, Power of Attorney, etc.
6. Real Estate information
   a. Current Value
   b. Mortgage balanced, interest rate, type of mortgage
7. List of Debts – including interest rate and amount owed
   a. Credit cards
   b. Auto Loans
   c. Personal Loans
   d. School Loans
8. One month's pay stub
9. Be prepared to discuss the following items
   a. How much do you spend each month
   b. What is your total monthly income?
   c. How much money do you contribute to savings or retirement?
   d. Are you anticipating any major one-time expenses in the near future?
   e. Do you anticipate any major one time receipts of money?
   f. Fill out Family Data Form

We will guide you from here!