

*How to Prepare and What to Expect*

# Your First Financial Planning Meeting

If you have questions or are ready to set up a financial planning meeting, call us at (865) 226-9982 or send an email to [connect@tvamp.com](mailto:connect@tvamp.com)



**Working with TVAMP can help you spend less time wondering if you're headed in the right direction with your investments or your finances in general.**

The goal of our first meeting is to answer these two questions:

- *Where are you now?*
- *Where do you want to be?*

We understand it can be difficult to know where to start when defining these two things. When you come prepared to our meeting helps us make your financial picture become clearer. We will help you focus and not be distracted by life as we determine your expectations for risk and reward. We will help you push through the noise and get to the truth about what you really want.

First, we will send you a Confidential Questionnaire to fill out and send back to us before our scheduled meeting. The more specific you can be with us the better! We've put together a list of documents and statements that are important when defining your current financial situation. We've also included a few questions we may ask to determine where you want to be in the future.

**Financial planning pulls together all your finances and organizes them to help make management easy and effective.**

**Please bring the following documents:**  
(You don't have to show them to us, but you will want to have them in hand).

- Recent financial statements:**
- 401(k) or other employer-sponsored retirement plan statements
  - IRA Statements
  - Bank account and CD statements
  - Brokerage account statements
  - Trust account statements
  - Insurance policies

- Recent income and identity documents:**
- Current salary information
  - Most recent tax return
  - Most recent Social Security statement (if available)
  - Birth dates, addresses, Social Security numbers and photo IDs (for you, your spouse, and your beneficiaries if applicable.)

- A list of your average monthly expenses:**
- Mortgage or rent
  - Credit card payments
  - Other loan payments (student, home or equity loans)

Also, be prepared to talk about any wills and trusts (that is, the extent of any estate planning and the date the will or trust was created.)

- Things we may ask:**
- What are your financial and lifestyle goals both short term and long term (vacation, buying a house, saving for college, planning to retire)
  - How soon do you hope to achieve these goals?
  - What income do you think you will need in retirement?
  - What questions or concerns do you have about investing or using our services?

**What happens as a result of this meeting?**

- Your TVAMP advisor and you will have a clear picture of your financial situation, your tolerance for risk, and what you hope to achieve.
- After choosing to engage our services, you'll receive a simple, personalized Financial Roadmap document showing where you are *now* and where you aim to be in the *future*.
- The cost can be built into your investment management fee (AKA Comprehensive Wealth Management), or for Financial Planning only, a retainer, or a one-time fee.

*Keep in mind: The costs of our services may be smaller when compared to the opportunity cost of not managing your money for the long-term.*

