Bring this to your Deep Dive

A 10-question checklist for our 60 minutes together

There is no homework and there are no wrong answers. Jot down a few thoughts, bring what you have, and leave the rest to us. The more we understand about what matters to you, the better we can use our 60 minutes. Bringing this checklist is entirely optional.

About you and what matters

☐ 1. What is prompting this conversation now?

A sale, a retirement date, an inheritance, a move, a new job, a change in your family. The moment that brought you here usually tells us what matters most.

☐ 2. When you picture the next 10 years going well, what does an ordinary week look like to you?

Who is in it, where you are, and how you spend your time. Money is a tool, and this is what we are helping it build.

☐ 3. What are the two or three things you most want your money to do for you and the people you care about?

Security, freedom, time with family, generosity, a business, a legacy. Rough answers are fine.

☐ 4. What worries you most about money, even if it feels like a small or silly worry?

Naming it out loud is often the first step toward a plan that lets you stop carrying it.

☐ 5. Who else is part of these decisions?

A spouse or partner, children, a business partner, a CPA or attorney. You are welcome to bring someone along.

☐ 6. What is working with the way you handle things today, and what is not?

This includes any advisor, accountant, or approach you use now. We would rather learn from what you already have than start from scratch.

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What to bring

☐ 7. What do you have on hand that gives us a picture of where you stand?

Recent account statements, your latest tax return, estate documents, and insurance summaries are all helpful. Bring whatever is easy to find and do not worry about organizing it. For your security, please do not write out Social Security numbers or full account numbers on anything you bring.

About us

☐ 8. How will we work together, and what will that look like from year to year?

Ask who you will work with, how often we will meet, and what you can expect between meetings.

☐ 9. How are you paid, and what will I pay in total?

Ask for every cost in dollars and in writing. We are glad to walk through our Form ADV and Form CRS with you.

☐ 10. What would need to be true at the end of our 60 minutes for this to feel like time well spent?

Tell us at the start, and we will make sure we get there.

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