DISTRICT
FINANCIAL ADVISORS

WHAT TO EXPECT FROM OUR INITIAL MEETING

It starts with an honest conversation. We want to get to know you and your family, how you arrived at this moment, where you want to go in the future, and what you hope to get from this relationship.

We'll also talk about our process and address all your questions. When you're ready we'll dig into the financial details.

ITEMS WE'LL DISCUSS:

Your Goals

- What's most important to you?
- How does your ideal retirement look?
- Who do you want to protect?

Income & Savings

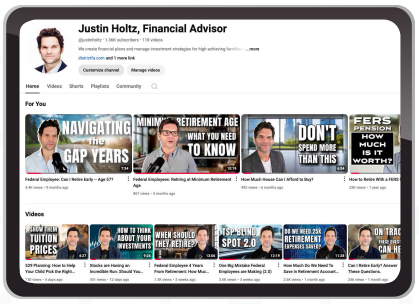
- Sources of Income
- Saving & Investing Amounts
- Tax Returns
- Summary of Expenses

Your Accounts

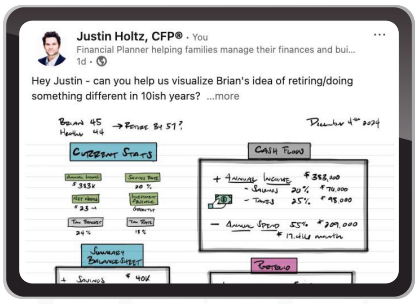
- Retirement Accounts
- Investment Accounts
- Social Security
- FERS Basic Annuity
- Federal Benefits
- Stock Options
- Mortgage
- Loans
- Credit Cards
- Student Loans
- Estate Planning Docs
- Beneficiaries
- Bank Accounts
- Life Insurance
- Disabiity Insurance
- Long-Term Care

*__No pressure to have any documents__ for our meeting, just be ready to talk through your situation, we can work on it together.

RESOURCES



YouTube



LinkedIn

Securities and advisory services offered through LPL Financial, a Registered Investment Advisor, member FINRA/SIPC.

DISTRICT FINANCIAL ADVISORS

Based in Northern Virginia,
offering virtual meetings nationwide.

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