Topics for Discussion

Name:_________________________________

Date:_________________________________

HANCE FINANCIAL, LLC
Helping You Create and Protect Wealth

Everyone has concerns – we would like to know yours. In an effort to get to know you better and ensure we cover your topics of interest, please take a moment to check the items you would like to discuss during our meeting.

General

- ☐ Reaching your financial goals
- ☐ Comprehensive look at your financials
- ☐ Updating your financial analysis
- ☐ Coordinating and organizing your assets
- ☐ Debt consolidation

Retirement Strategies

- ☐ Retirement target date and income needs
- ☐ Review employer plan (i.e., 401(k) or profit sharing)
- ☐ Contribution limits and portability of IRA, 401(k), and other qualified plans
- ☐ Roth versus traditional IRAs
- ☐ Multigenerational IRAs
- ☐ Pension evaluation
- ☐ 403(b) TSA/TSCA plans
- ☐ 401(k) options at retirement
- ☐ IRA required minimum distributions (RMD)

Please bring recent 401(k)/IRA statements.

Insurance Planning

- ☐ Life insurance
- ☐ Disability income insurance
- ☐ Long-term care insurance
- ☐ Automobile insurance
- ☐ Home, fire, and theft insurance

Please bring current policies or statements.

Investments

- ☐ Stocks and bonds
- ☐ Mutual funds
- ☐ Annuities
- ☐ Asset allocation
- ☐ Market expectations

Please bring current investment statements.

Estate Planning

- ☐ Wills
- ☐ Power of attorney
- ☐ Unified credit
- ☐ Unlimited marital deduction
- ☐ Gifting
- ☐ Minimize estate taxes
- ☐ Review beneficiary information

Please bring relevant documents.

Education Funding

- ☐ Cost of public versus private schooling
- ☐ 529 college savings plans
- ☐ Student loan consolidation or repayment

Please bring recent 529/UTMA statements.

Tax Management

- ☐ Minimize income taxes
- ☐ Tax deductions and exemptions
- ☐ Tax deferral
- ☐ Tax credits

Please bring most recent tax return.

Life Transitions

- ☐ Career change
- ☐ Divorce planning
- ☐ Children
- ☐ Health changes
- ☐ Loss of a loved one
- ☐ Special needs family member

- ☐ Other:_____________________________
- ☐ Other:_____________________________
- ☐ Other:_____________________________

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