FIDENT FINANCIAL

DISCOVERY CALL RECAP - FAMILY

MONTH 2020

FAMILY VALUES

Family

CURRENT GOALS WITH MONEY

Retirement eventually
Kids savings - have flexibility
Others

WHAT YOU'RE LOOKING FOR IN AN ADVISOR

Someone to build an actual financial plan - not sell an insurance product
Someone to guide on how much to be saving for retirement
Someone to give investment advice on how to be invested

WHAT FIDENT WOULD FOCUS ON RIGHT AWAY

Review current free cash flow
Compile a complete net worth picture
Discuss the most appropriate ways to be saving for various goals
Evaluate insurance needs and coverage (home/auto, life, liability, etc.)
Do a current tax review and projected future tax liability comparison
Identify best ways to allocate cash-flow
Review current investment and level of appropriateness

ESTIMATED PLANNING FEE

$2,500 - $3,500

CURRENT STATUS / NEXT STEPS

Will wait to hear back from you on when/if it makes sense to move forward.
Added to weekly Fident Friday letter list