EVARD
FINANCIAL ADVISORS, PLLC

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Create a Better Financial Future

PLANNING LIST

We have created simple to follow documents needed for planning list to ease you through the preparation for your first financial planning meeting.

You will receive:

- Document Check List
- Postage Paid Return Envelope
- Confirmation of Receipt

DOCUMENT REVIEW

We will confidentially review your documents and an initial analysis will be completed that outlines your current financial condition.

Your evaluation will include:

- Savings & Investments
- Insurance Coverage
- Educational Planning
- Estate Organization
- Retirement Plan
- Tax & Social Security
- Debt to Income

THE FINANCIAL PLAN

We will meet with you to talk about your financial plan and the best direction to take in meeting your financial goals.

Your evaluation will include:

- A personalized three-phase meeting schedule to chart your short term and long term financial course.
- A customized budget based on your current assessment and future goals.
- Your investments will be reviewed on a quarterly basis and we will meet as needed by your plan.

We encourage you to call us with any questions you have about your financial life at any time.

Begin today.