Pre-Meeting Information Request

Please complete the below information and email back to us or bring with you to your appointment.

Name 1 (First, MI, Last)

Name 2 (First, MI, Last)

Phone (Home) (Cell)

Email(s)

Address

City State Zip

How did you hear about us?

What are your biggest financial concerns?

Primary Questions

Planned retirement date, or if retired, date of retirement

In order to advise you best, we perform a comprehensive review of your financial situation.
To accomplish this we ask you bring the following documents:

- Budget (if available)
- Company Plan Statements (401(k), 403(b), 457, etc.)
- All Other Investment Account Statements
- Life Insurance Statements
- Two Most Recent Tax Returns
- Estate Documents (if available)
- Social Security Statements (if available)

If you are unable to bring the above docuements to your appointment, please contact us to re-schedule.

PHILLIP JAMES FINANCIAL

▪ INVESTING WITH PURPOSE ▪

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