



LIFETIME WEALTH STRATEGIES

# WELCOME

*Hi There!*

**WE'RE LIFETIME WEALTH STRATEGIES, AND WE'RE HONORED TO MEET YOU.**

We are a small firm by design. Our goals are simple: maintain a team we trust, work with clients who want to learn, and help our clients envision and work towards their goals.

We offer services and expertise that can help with every aspect of your financial picture, but first we want to start with a welcome, and tell you a little about how we operate.

*Let's do this!*

**YOUR LIFETIME WEALTH STRATEGIES TEAM**

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# WHAT TO EXPECT

## EXPERTISE FOR EVERY PART OF YOUR FINANCIAL PICTURE

With decades of experience, and a love for teamwork, we're able to provide expertise in the following areas (and more).

- ✓ **INVESTMENTS THAT MATCH YOUR NEEDS**  
Whether you have strong feelings on where you do (or don't) want to invest your money, or you just have certain needs, we'll help you craft the portfolio that matches your goals.
- ✓ **TAX EFFICIENCY**  
Many financial decisions have taxable implications. We'll help you learn about them, and make efficient choices.
- ✓ **PLANNING**  
Need a deep dive into goals, timing of life decisions, and preparing for the future? Perfect. We can help.
- ✓ **INSURANCE**  
We'll discuss any gaps in your insurance and if there's a need for coverage, we'll help you get it.
- ✓ **BUSINESS OWNERSHIP**  
Does owning a business impact your finances? Yep. That's why we analyze those plans too.



# FIRST MEETING CHECKLIST

**COMPLETE THE “WHAT WE SHOULD KNOW” FORM (NEXT PAGE)**

This quick questionnaire helps gives us all of the information you want us to know

**CONSIDER YOU GOALS**

What are your main priorities? What keeps you up at night? What are your big, dazzling goals? Dream big, dig deep, write down what brought you here. We'll want to hear them when we meet.

**DETERMINE WHAT YOU'RE LOOKING FOR**

We firmly believe that our work is about great relationships. You'll want to make sure this relationship is a great fit for you. Consider what you're looking for in a financial advisor, and we can discuss when we meet.

## HOW TO REACH US

Office Hours: M - F 8:30am - 5:00pm

 Email	<a href="mailto:info@contactlws.com">info@contactlws.com</a>
 Phone	502-267-5433 (LIFE)
 Website	<a href="http://www.contactLWS.com">www.contactLWS.com</a>

# WHAT WE SHOULD KNOW

## INTRODUCTORY QUESTIONNAIRE



### PERSONAL AND FAMILY INFORMATION

FIRST CLIENT	Full Legal Name	Full Legal Name
	Date Of Birth DD/MM/YYYY	Date Of Birth DD/MM/YYYY
	Mobile Phone	Mobile Phone
	Personal Email	Personal Email
	Preferred Method of Communication Text    Call    Email    Other _____	Preferred Method of Communication Text    Call    Email    Other _____
Home Address	City	State    Zip Code
Mailing Address <input type="checkbox"/> same as home address	City	State    Zip Code

FAMILY INFORMATION

Tell us about your family. Any details that are pertinent to your financial situation, or even just what you all like to do on the weekends.

### YOUR FUTURE SHARE EVENTS AND GOALS OVER THE NEXT FEW YEARS

EVENTS	Marriage	GOALS	Make new investments	TELL US MORE!
	New Children		Increase Savings	
	Graduation		Retire	
	Purchase of a Business/Practice		Career Change	
	Raise, Bonus or Promotion		Evaluate Insurance Coverage	
	Job Change		Sell Business	
	Care for a Loved One		Pay off Loan/Obtain Loan	
	New Dependent		Large Purchase	
	Inheritance			

What do you hope to get out of working with our team?

What areas do you want to focus on immediately?