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

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	info@contactlws.com
Phone	502-267-5433 (LIFE)
Website	www.contactLWS.com

WHAT WE SHOULD KNOW

INTRODUCTORY QUESTIONNIARE

LIFETIME WEALTH STRATEGIES

PERSONAL AND FAMILY INFORMATION

FIRST CLIENT

Full Legal Name

Date Of Birth DD/MM/YYYY

Mobile Phone

Personal Email

Preferred Method of Communication

☐ Text ☐ Call ☐ Email ☐ Other__________

SECOND CLIENT

Full Legal Name

Date Of Birth DD/MM/YYYY

Mobile Phone

Personal Email

Preferred Method of Communication

☐ Text ☐ Call ☐ Email ☐ Other__________

Home Address City State Zip Code

Mailing Address ☐ 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
- ☐ New Children
- ☐ Graduation
- ☐ Purchase of a Business/Practice
- ☐ Raise, Bonus or Promotion
- ☐ Job Change
- ☐ Care for a Loved One
- ☐ New Dependent
- ☐ Inheritance

GOALS

- ☐ Make new investments
- ☐ Increase Savings
- ☐ Retire
- ☐ Career Change
- ☐ Evaluate Insurance Coverage
- ☐ Sell Business
- ☐ Pay off Loan/Obtain Loan
- ☐ Large Purchase

TELL US MORE!

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

What areas do you want to focus on immediately?