DAVIS SEILEY
WEALTH MANAGEMENT

Thank you for your interest in meeting with us to discuss your financial planning and investment management needs. During this meeting, we'll be considering the following:

1. Your financial history and background and what is important to you.
2. Important personal and professional transitions that may have financial implications.
3. Financial and investment principles that you want followed and/or understood.
4. Your financial goals, objectives and time tables and the resources available to meet these.

It is our sincere hope that we will make the best use of your time and determine if and how we may be of service to you. ***There is no charge for this initial hour consultation***. In order understand your situation, we will be doing the following during the meeting:

- A complete review of all assets and liabilities
- Review of all estate planning documents
- Review of all employee benefits and pension plans
- Review of life, disability, and long-term care insurances
- Review of investment portfolio

Please bring the following documents (as relevant) with you to the meeting:

- Most recent tax return
- All wills/trusts and estate planning documents
- Employee benefits documents
- Mortgage, equity line, credit card, and other debt statements
- Bank and investment account statements, including retirement accounts (IRAs, 401k's, 403(b)s, etc).
- Insurance coverage information and/or statements and policies (life, disability, long-term care)

We look forward to meeting with you. Should you have any questions prior to our meeting, please do not hesitate to call us.

DAVIS & SEILEY WEALTH MANAGEMENT
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