PREPARING FOR YOUR INITIAL CONVERSATION

Thank you for scheduling time to speak with our team! We're looking forward to learning about your financial goals and exploring how we might be able to help you achieve them.

The more complete information you can provide, the more productive our conversation will be. Here are some items that may be helpful to have available:

CHECKING/SAVINGS ACCOUNT STATEMENTS

- Your most recent statement available for each account
- Approximate balances are fine if unable to gather statements

EMPLOYER INVESTMENT ACCOUNT DETAILS

- 401(k), 403(b), pensions, or other employer-sponsored plans

PERSONAL INVESTMENT ACCOUNT INFORMATION

- IRAs, brokerage accounts, annuities, or other investment holdings

ESTIMATED HOME VALUE + REMAINING MORTGAGE BALANCE

- Approximate values work well—no need for exact figures

LIST OF QUESTIONS AND CONCERNS

- Retirement planning, college funding, tax strategies, estate planning, etc.

Your privacy matters. Any information you share with us is completely confidential.

Questions before your call? Feel free to reach out to us at any time either by email at info@willowcreekwealth.com or by phone at 707.829.1146 and we'll be happy to help.

WILLOW CREEK
WEALTH MANAGEMENT