

INITIAL MEETING OVERVIEW AND CHECKLIST

WHAT TO EXPECT FROM YOUR INITIAL MEETING

Seeking expert advice on your finances is a big step, but you're in safe hands with Polaris Wealth Management.

Our initial meeting might push you a step or two out of your comfort zone. But it's important that we both understand what matters most to you and how you'd like your future to look.

If you're not entirely sure what we're going to cover, below are some of the things you can expect us to discuss.

YOUR PASSIONS

You should be prepared to talk about your passions, including your financial and life goals and what you want to use your money for.

Your ambitions are unique to you, so the more detail you can provide me with, the better. What do you want to do? How often do you want to do it? How much do you expect it to cost?

Once we know what you're passionate about, I can help you live life to the fullest with the money you have.

YOUR PERSONAL LIFE

I want to know about you, not just your money.

When we meet, I'm likely to ask about your family, your job, your health, and your background.

We'll also discuss your relationship with money, including what it means to you and what you think it will allow you to do.

Your past experiences will shape your financial and life decisions, so it's essential that I know about these too.



YOUR FINANCES

It's crucial that I understand exactly where you are financially.

I need to know about what you own and what you owe, as well as what you earn and what you spend. The more you share, the more accurate your future plans will be.

The checklist below details the specific financial information that will help our discussion.

CHECKLIST

Please consider the information below and bring any applicable documentation with you. This will make our initial meeting even more productive.

Details of your future plans	
Details of any assets you own	
Details of any debts or liabilities	
Details of current income	
Details of any investment plans, personal pension arrangements, and/or insurance policies	
Details of any work or occupational pension schemes and any other employee benefits (e.g., on death or illness)	
Any other information you think would be useful	

Please have available the following information at our meeting:

Your National Insurance number(s)	
Your passport(s)	
A utility bill or bank statement dated in the last three months	

If we are meeting at your home, it's really useful to have your wifi code ready to share.