



## JONES FINANCIAL GROUP

### Meeting with Us

#### *What to bring*

- **A list of any questions** you have regarding your current financial situation.
- **Any account statements**, budget information or other areas of your financial life that you feel deserve immediate attention.
- **A list of future dreams and financial goals** you would like to achieve, including both short- and long-term goals.

#### *What to expect*

**Professional help in clarifying your financial goals and priorities.** If you decide to work with us you will receive sound financial advice at a fair price, tailored to your investment objectives. Accurate information about our tailored strategies, including risks, benefits and costs.

Your meeting will include a review of your existing financial situation and potential opportunities, gaps or general strategies. While you won't receive a comprehensive review or financial planning services for which fees are charged, you should expect to get a sense of what it might be like to work together.

#### *My approach*

**I am passionate about working with my clients** and want them to experience financial confidence now and in retirement. I will look at your entire financial picture – cash reserves, debt management, investments, protection and taxes, ask targeted questions and listen closely to your answers. I want you to feel confident that the advice I provide reflects your unique dreams and goals.