EBERST WEALTH MANAGEMENT

Your first conversation with Bruce

Your conversation worksheet

Use this page to collect your thoughts before speaking with Bruce. Keep it for yourself; do not include account numbers, passwords or other sensitive information. A first conversation does not require completed paperwork.

What I want to discuss

What prompted this conversation

Decisions ahead and what matters most

Who I would like to include

What I want to understand

The scope and written work to agree

Fees, costs and professional responsibilities

Information needed before moving forward

The next step and review rhythm

Whether to continue and who will follow up

Review frequency and contact between meetings

Changes I should bring to Bruce’s attention

Preparation guide only; not individualized investment, legal or tax advice, a recommendation, or a completed financial plan. Services, deliverables and fees are agreed separately.

eberstwealthmanagement.com/services/approach

Bruce Eberst · (561) 276-1544 · September 13, 2026