EBERST WEALTH MANAGEMENT

Investment management

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 my portfolio needs to do

Near-term uses for my money

Longer-term objectives

How I feel about losses and uncertainty

The accounts in the picture

Account types and their intended roles

Concentrated holdings or restrictions

Costs and liquidity questions

Questions for Bruce

What would a portfolio review include?

Which accounts and decisions would the engagement cover?

What reporting, review schedule and fees would apply?

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/investment-management
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