EBERST WEALTH MANAGEMENT

Protection & legacy

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.

The people and priorities

People who depend on me financially

Responsibilities and intentions to discuss

Family changes since my last review

What needs a closer look

Existing coverage and questions about it

Beneficiary arrangements to review

Questions for my attorney or accountant

Questions for Bruce

What would a protection review cover?

Who would be responsible for each next action?

What costs, commissions and review arrangements 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/protection-and-legacy
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