ARBORFRONT FINANCIAL

What to Expect in Our First Meeting

We're excited to meet with you and for the opportunity to help you and your family reach your financial goals. Here's what you can expect in our first meeting:

Agenda:

Typically, the first meeting last from 30 minutes to an hour. We will get to know each other and get an understanding of your goals and current financial situation.

Topics:

-Your Goals and Priorities
-Your Current Financial Situation
-Who We Are and Ways We Can Help
-Questions You Have
-Next Steps
-Fees

What You'll Need:

You don't need to bring anything to our first meeting, however, the following is helpful for our team to begin designing the best plan and investment portfolio for your situation:

-Current Debts and Interest Rates
-Amount of Money in the Bank
-General Sense of Monthly Income and Expenses
-Approximate Value of Retirement and Investment Portfolios
-Information about Work Benefits Plans

What You Can Expect From Us:

-No Sales Pressure to Commit
-Honest Advice about ways we can and can't help

Contact Information:

231-843-1516
elizabeth.dekuiper@lpl.com
raymond.janish@lpl.com