Dear Lionel,

Jack asked me to send you this email to have you schedule a time for what we call in our process as our Discovery Meeting. Please click on the calendar link below to schedule the day and time for your meeting and plan on the meeting lasting between one and half to two hours. We will send you the Zoom link with your appointment confirmation the day before.

[Jacks Calendar Link to Schedule Your Discovery Meeting](https://calendly.com/jack-16/2-hour-discovery-meeting)

At your meeting, Jack will ask you a series of questions to really understand what is most important to you, what you would like to accomplish and what keeps you awake at night. Jack will determine where you are now, where you want to be and any gaps or obstacles that stand in the way. It’s his chance to get a very clear picture of your goals and values so that he can guide you in how best to achieve them. Attached please find our Wealth Management Process and Wealth Management Formula.

To help him obtain a comprehensive view of your financial situation, please have the following information available for your meeting.

1.         Your last two years’ income tax returns

2.         Any recent financial statements prepared for refinancing, etc., if any

3.         Current bank statements, if any

4.         Current mutual fund statements, if any

5.         Current brokerage statements, if any

6.         Current mortgage statements, if any

7.         Current life insurance policies, if any

8.         Current employee benefit statements, including those for 401(k) or other retirement plans, if any

9.         Any wills or trust documents

10.      Anything else you believe would be useful for Jack to gain a better understanding of your financial situation

If you have problems locating any of the information, please give me a call so we can help direct you to the proper source to obtain the necessary information.

I would also like to ask you to take our quick questionnaire through the link below. It will help us to understand your current situation so we can better prepare for the meeting.

[Pre-Discovery Questionnaire, Click here.](https://www.surveymonkey.com/r/9Z5V5DD)

You can visit our website to learn more about our company and Jack at: [www.PremierWealthCoach.com](http://www.premierwealthcoach.com/)

We look forward to exploring how we might be able to assist you in achieving your financial goals.

Best Regards,