**Pre-Discovery Meeting Template**

Dear Client,

This email is to confirm your virtual appointment on Zoom with Jack Gelnak, JD, for Tuesday, January 26th at 5pm. Please plan on the meeting lasting about 90 minutes.

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 you so that he can guide you in how best to achieve your most important goals.

To help him obtain a comprehensive view of your financial situation, please have the following information before the Zoom Meeting. You will reference this information during the 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/). For more details on our Wealth Management Process and the Discovery Meeting click [here](https://www.premierwealthcoach.com/wealth-management-process) to visit our website.

Please join our Zoom Meeting through the link below:

Join Zoom Meeting

Jack Gelnak is inviting you to a scheduled Zoom meeting.

Topic: Jack Gelnak Zoom meeting with Michael Gelnak

Time: Jan 26, 2021 05:00 PM Pacific Time (US and Canada)

Join Zoom Meeting

<https://us02web.zoom.us/j/87984285953?pwd=TkQzU3FFcDZGTWFHOXkvMGhxRnFLdz09>

Meeting ID: 879 8428 5953

Passcode: 485089

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