What To Expect

Hello there,

Thank you for considering our firm as you move forward with one of the biggest investments you will possibly make, your retirement and financial future.

I am looking forward to meeting you at our scheduled date for our Discovery Meeting.

We know that whether or not you have worked with a financial planner before, it can be unnerving walking into the first meeting. Often people have had a sour experience with a financial planner or no experience at all. So, at our Discovery Meeting, we will do our best to make your experience as comfortable and clear as possible.

We will have a lot of questions, as we're sure you will too. We know it can sometimes be uncomfortable to talk about money for an hour! But all of our questions are to ensure that we have a way to help you.

This meeting does last an hour. During which we want to get perfectly clear on your...

- Goals
- Concerns
- Unique financial situation

During our time we will cover the following...

- Answer your questions
- Review your information and documents
- The four pillars of financial planning
- Our investment philosophy
- Provide a price range
- Next steps and our new client process

Please ensure that you bring all requested documents to our meeting.

Don't worry, we won’t give you the “hard sell”. We will only ask you to make one decision during our meeting: At the end we will ask if you would like us to send you a firm proposal for our services.

Once you receive our proposal, it will be your decision how we proceed!

Respectfully,

Jonathan R. Harner, CFP®

WichitaWealth.com • (316) 722-1010 • 889 N. Maize Rd #109, Wichita, KS 67212