SAGE FINANCIAL SYSTEMS
PLAN YOUR WAY

The Gilliam Team Action Meeting Documents

Please provide the following at least 5 days prior to your meeting:

Don't worry if you don't have all your goals established or are unsettled about past financial mistakes. The Gilliam Team will help you navigate towards a secure financial future. Please provide our team with the following documents and information **at least 5 days prior to your meeting** so that we can create a plan based on the values that are most important to you:

1. Financial Statements – including banks, brokerage firms, retirement accounts.
2. Tax documents from the past year
3. Income Information - monthly income and cash flow
4. Expense Information – monthly budget and any other expense considerations
5. Debt – including mortgage, credit cards, student loans, car loans, and any other debt. Please include interest rates and terms on all loans.
6. Insurance and Legacy – a copy of insurance declarations pages and any estate planning documents, for example Power of Attorney, Medical Directive, Trust and Wills
7. Your Questions – Did you think of something that we did not discuss in the Values Interview that you would like added to your plan? Please provide us with that information.