RAYMOND JAMES®

TAKE THE CRUCIAL FIRST STEP!

What to bring for your initial consultation with us:

These documents will allow us to have a basic understanding of your situation if provided:

- List of assets (Bank accounts, retirement accounts, Real estate, cars etc.)
- List of liabilities and debts (Credit cards, loan balances, medical bills, mortgages, etc.)
- Annual Income estimates for both parties
- Child care cost if warranted

The following documents all though not essential will allow for a more thorough discussion:

- Most recent tax returns
- Financial affidavit or;
- Current Budget
- Social Security statements (for both parties if possible)

Don't forget:

- A list of your questions
- Your wish list - If you could sign a divorce settlement right this instant, what would it say? What kinds of provisions would it contain?

What should you expect?
Our goal for the meeting

✓ Create a very clear action plan on how to proceed and feel financially confident.

✓ Uncover any hidden challenges that could sabotage your financial success by understanding the process of divorce and which actions you should or shouldn't take.

✓ Leave the session feeling empowered and in control with personalized financial calculations.

✓ You'll also receive worksheets & checklists so your confidently prepared for the next steps.

www.OrlandoDivorcePlanning.com

Please note, changes in tax laws or regulations may occur at any time and could substantially impact your situation. While we are familiar with the tax provisions of the issues presented herein, as financial advisors of Raymond James we are not qualified to render advice on tax or legal matters. You should discuss any tax or legal matters with the appropriate professional.

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