Financial Security by Design

Planning and Compliance for Individuals, Trusts and Estates

Introductory Interview And Report For New Customers

This special offer is analogous to a well visit with a new physician. We begin by understanding the issues that led you to contact me. To put these in context, we discuss your health, current income and resources, future income and expenses, financial aspirations, special needs (for a parent, perhaps), insurance and your goals for the disposition of your estate.

I prepare a written report summarizing our discussion and responding to your concerns to the extent that I can without extended analysis or document review. My report recommends how we might address follow-up issues with milestones and cost estimates. My further involvement may not be necessary.

I charge $1,500 for the interview and report. This offer is not going to make me rich but it occasionally leads to further business and it reassures my liability carrier that I have addressed your concerns comprehensively.

Check out my website, especially the information that I file with the California Department of Corporations at www.lingane.com/tax/adv.pdf. My website should give you a sense of my interests and prejudices.

If you decide to proceed beyond our initial discussion, we will need to execute a formal advisory agreement; e.g., www.lingane.com/tax/contract.pdf.

I know that you would be furious if I sold your information or disposed of it in a careless manner or used your information as the basis for an unsolicited sales promotion. I pledge to do none of these things. I will keep our initial discussion confidential indefinitely except where

- You authorize me in writing to share your information with another.
- Disclosure is required by law, by a court, by a regulatory agency such as the California Department of Corporations, or by the Certified Financial Planner Board of Standards pursuant to a disciplinary review process.

In preparation for our meeting, please think about the issues that led you to contact me. Summarize your present finances. Think about how your income might grow, when you hope to purchase a home or start a family or start your own business or retire. How do you cope with stock market declines? Bring along copies of your most recent income tax returns.

I look forward to meeting you and helping you to financial security.

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