Let's Set the Table!

Kitchen Table Advice, LLC
Practical Financial Planning™

Mail, fax, or email this form along with a copy of your account statement(s) to: 375 Wilbraham Road, Hampden, MA 01036 • Phone (866) 788-2344 • Fax (866) 495-0227 • Email SetTheTable@KitchenTableAdvice.com

You Need Assistance With…

401(k) ☐ 403(b) ☐ 457(b) ☐ SEP ☐ IRA ☐ Roth IRA ☐ Coverdell/Education IRA ☐ 529 Plan ☐ Keogh ☐ Other: ____________

A Little About Yourself…

(We need some information to be able to evaluate your needs)

Name: ____ Home Phone: __________________________

Street Address: ____ Work or Cell Phone: ______________________

City: ____________________ State: ______ Zip Code: __________ Email: ________________________________

Date of Birth: ______________ Gender: Male ☐ Female ☐ Marital Status: Single ☐ Married ☐ Divorced ☐ Widow ☐ Partner ☐

Children/Dependents: How Many? ______ Ages: ________________________ No. in College or Plan to Attend? _________

Occupation: ______________ Does your employer match any amount you save? Yes ☐ No ☐ Maybe ☐ How much? __________

Household Income: $__________ Own ☐ Rent ☐ Payment: $ _______ Approx. Owed on Auto & Credit Cards: $ __________

Evaluate Your Financial Stress Level…

(Circle what best describes how you feel for each.)

	Don't Agree	↔	I'm Good	↔	Absolutely
I'm Ok with stock market ups & downs, just so my nest egg gets bigger.	1	2	3	4	5
Retirement isn't a big deal to me, just as long as my home is paid for.	1	2	3	4	5
I'm fairly secure in my job right now. Besides, I'd get another one quick.	1	2	3	4	5
In the grocery store express lane, it's Ok to have more items than you should.	1	2	3	4	5

Our Menu…

(Please select the level of advice – you only need to choose one, as each builds on the other.)

☐ **Blue Plate Special**	Our basic service. We review how your current investment choices are divided up or allocated. If needed, we recommend how these choices should be changed based on the information provided above, the alternatives available, & our investment discipline. And, you don't need to worry about doing the dishes, either! ☐ **Multiple Accounts** We charge our basic service fee for each account statement submitted, since we review each one independent from another. You're only charged once for the additional menu items below.	**$29.99**
☐ **Meat & Potatoes**	In addition to our basic service above, we will make a recommendation regarding the percentage of your salary/wages you should save as well as how any future savings should be allocated among the plan alternatives from this point forward. Please let us know whether you want the gravy on the side!	**$69.99**
☐ **Comfort Food**	We take the above one step further and throw in a telephone consultation to talk about anything you want to discuss about your finances or retirement planning. It's your dime, & we take as long as you want.	**$129.99**
☐ **Thanksgiving Dinner** *(Not For Dieters, Please)*	Everything we do above, but we do it all over again after 6 months & then a year, depending on your choice. This comprehensive level includes answering or clarifying any questions you may have regarding your finances throughout this period. It's like having your own personal finance department at your beckon call.	☐ **$199.99 6 Months** ☐ **$349.99 1 Year**

☐ Please contact me about your fee-only ***Complete Family Financial Planning Services***.

Picking-Up the Tab…

The prices above are for submitting one account statement for review. Add $29.99 for each additional statement you submit. If that's as clear as mud, just email us at SetTheTable@KitchenTableAdvice.com. We'll figure it up for you, so you don't have to fret about it.

Check ☐ Visa ☐ MasterCard ☐ Discover ☐ Am Express ☐ Card Number: ______________________ Exp. _______

I read & understand the Agreement to Provide Financial Planning Services, Disclosure Statement, & Privacy Statement:

Signature: ______________________________ Print Name: ______________________________ Date: __________

Let's Set the Table CHECKLIST

To make things a little easier, we have a checklist below to make sure we get everything needed to help you out. Just go down the list and put a checkmark next to each applicable item as you do it, and we'll be good to go!

- ☐ Look over the Agreement to Provide Financial Services, Disclosure Statement, & Privacy Notice.

- ☐ Print out the Let's Set the Table Form, complete it as best you're able, and sign it at the bottom.

  ***As a reminder, you might not have to send us payment if your Employer is sponsoring your use of our services at special discounted corporate rates. For participating Employers, we will bill them directly Email us with any questions on this at** **SetTheTable@KitchenTableAdvice.com**.*

- ☐ Attach a copy of your latest account statement to the Let's Set the Table Form.

- ☐ If we're reviewing a 401(k), 403(b), or 457(b) account statement for you, we must have the investment choices available to you in your plan. Each plan gives you a number of selections that you can invest in & these are the investment choices we analyze to get you into the best ones. If your account statement is mailed to you, it should show up there on one of the attached pages. If you access your account on-line, you'll have to go to where it's posted on the web-site and print off a copy. Please call your HR department if you don't know how to obtain this information, and they'll be happy to direct you to the right spot. Or, you can always email us at **SetTheTable@KitchenTableAdvice.com,** and we'll be happy to help.

  Should you be utilizing our services through your employer, we should already have your account choices, so you're off the hook on this one!

- ☐ If we're reviewing any other type of tax-deferred account like an IRA, a Roth account, or a State sponsored 529 College Savings Plan to name a few, we most likely already have all the information needed. We'll email or call you if we need to get additional information.

- ☐ Should you be paying by check, please enclose the payment along with sending everything to us. We can't tell you how many times folks have forgotten that little tid-bit.

- ☐ Keep a look out for our completed report by return mail, fax, or email as well as your free gift for using our services.

- ☐ Tell your friends and neighbors about us, too! They could also use some first-rate and affordable financial advice to be prepared for their retirement, too!

We're always happy to answer your questions or assist you in anyway possible. Please call us at (866) 788-2344 or email us at **SetTheTable@KitchenTableAdvice.com,** if we can be of any help or clarify any concerns you may have.