Key Steps Toward Achieving Your Personal and Business Financial Goals

Understanding what is important to you, your family and your business can help you identify and reach your goals.

STEP 1 WHERE AM I TODAY?

We want to understand what's important to you – and your business. Each time we meet, we'll discuss your needs and evaluate information such as:

- Listing of monthly personal and business expenses
- Last year's personal and business tax returns
- Personal and business retirement plan statements
- Brokerage, bank or other financial statements
- A professional estimate of the value of your business

STEP 2 WHERE WOULD I LIKE TO BE?

By translating your needs into specific, measurable goals, we can easily track your progress over time. These goals may be related to:

- Saving for retirement
- Providing a retirement plan for your employees
- Living comfortably in retirement
- Funding a child's education
- Helping support other family members
- Having appropriate insurance to help protect your and your business's financial goals
- Preparing for the eventual sale of your business
- Making sure your and your business's assets pass to your heirs the way you intend your financial goals

STEP 3 CAN I GET THERE?

We'll review your current situation and consider potential solutions and strategies together. If you wish, we may involve your tax and legal professionals.

STEP 4 HOW DO I GET THERE?

You have choices in how we can work together. Based on your priorities and preferences, you can select the account options and mix of investments and services that can help you achieve your personal and business goals – and protect them.

STEP 5 HOW CAN I STAY ON TRACK?

Meeting regularly can help ensure you stay on track. If your goals or circumstances have changed, we can make appropriate updates that address your evolving needs.

**Let's discuss your answers to these five key questions.
Doing so can help you work toward your financial goals.**

Edward Jones does not provide tax or legal advice. Consult a qualified tax or legal professional regarding your particular situation if this advice is needed.

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