



Massow Wealth Strategies Inc.

strat-e-gy - a plan of action designed to help achieve a major or overall goal.

<p>Our Mission :</p> <p>As a financial advisor since 1992, our mission is to provide clients with the knowledge and expertise they need to make educated financial decisions.</p> <p>In order to accomplish this, we combine our experience in the financial services industry with quality investment alternatives and the latest information and technology available.</p> <p>We strive to present information in a straightforward, understandable manner so that together with our clients, we can determine the most appropriate options available for their financial situation.</p> <p>We constantly consider changes in both the marketplace and in our clients' needs, making necessary adjustments to help them realize their financial goals.</p> <p>Come find out why we say – Other Firms Talk, We Listen....</p>	<p>Document Checklist for Our First Meeting</p> <p>From Your Bank:</p> <p>____ Checking Statement</p> <p>____ Money Market Statement</p> <p>____ Savings, CD Statements</p> <p>From Your Broker:</p> <p>____ Latest Monthly Statement</p> <p>____ Mutual Fund Company current value of investments</p> <p>From Your Insurance Company:</p> <p>____ Annual Statements</p> <p>____ Insurance Policies</p> <p>____ Annuity Contracts</p> <p>From Your Employer:</p> <p>____ 401(k or other Company Retirement Plan</p> <p>____ Deferred Comp</p> <p>____ Company Stock or Option Awards</p> <p>____ Employee Benefits</p> <p>From Your Personal Files:</p> <p>____ Tax Returns (last 2 years)</p> <p>____ Monthly Budget (if maintained)</p> <p>____ Mortgage</p> <p>____ Major Credit Balances</p> <p>____ Will or Trust Agreements</p> <p>____ Other Documents or Assets you would like us to review</p>
<p><i>Items I would like to discuss</i></p>	

1635 N. Greenfield Rd, Suite 138 // Mesa, AZ 85205 T 480.503.1084 F 480.503.0409

Securities offered through Raymond James Financial Services, Inc., Member FINRA / SIPC

Investment advisory services are offered through Raymond James Financial Services Advisors, Inc.

Massow Wealth Strategies, Inc. is not a registered broker dealer and is independent of Raymond James Financial Services.