



PREPARE FOR YOUR CONSULTATION

A consultation with Keever Capital, LLC will be as individual as your needs. Relationships with M Holdings Securities Co and trading through Pershing, LLC enables us to provide you with personalized advice and deliver the right mix of products and services for you.

Find the Right Partner

As your partner, we understand it's important that you feel comfortable with your financial partner when building a customized financial plan to help achieve your goals for the long term.

Key Topics For You To Learn About Keever Capital, LLC:

- Credentials and affiliations
- Ability to consider your entire asset portfolio including non-financial assets such as real estate, closely held business interests, or oil, gas and mineral interests
- Coordination with your other advisors to provide a complete range of services
- Frequency of financial review and updates
- Tax management strategies
- Experience – length of career, profile of client base, training
- Account pricing structure

Questions to Consider

To take full advantage of your consultation time, consider gathering the following information. The more you share about your goals, risk toleration and complete financial picture, the better we will be able to recommend optimal solutions.

At Keever Capital, LLC, our first step is to understand your goals.

What are your short-term and long-term financial goals?

- Save for a house
- Save for children's education
- Develop a retirement plan
- Start a new business
- Transfer wealth to future generations
- Establish a legacy

What are your financial questions?

- Am I on the right financial path to meet my goals?
- How can I better manage all of my investment accounts?
- How can I consolidate 401(k) plans that are still with former employers?
- Is there a better tax management strategy for me?

What is your current financial situation?

- Current investments, income from all sources, stock options, and retirement savings
- Current expenses such as mortgage, credit cards, loans and ongoing monthly expenses

How do you want to manage your accounts?

- What is your risk tolerance?
- How much do you want to be involved in developing your financial strategy and monitoring your portfolio?

Have you done any estate or financial planning?

- Do you have a will or have you established a living trust?
- Have you designated beneficiaries to your employer's retirement plan or other accounts?
- Have you designated individuals to make important financial and health care decisions for you in the event you become incapacitated?
- Have you created a financial plan?

Information and documents to bring to your consultation:

- Answers to the questions above
- Income and 401(k) Plan documents
- Recent tax records
- Monthly expenses including credit cards, mortgage, rent, or loans
- Investment account statements
- Social Security Numbers, birth dates and addresses of joint account owners and beneficiaries
- Personal identification including a photo ID for each owner of your accounts

TO SCHEDULE A CONSULTATION CALL: 206 342 1736.

The information on this page is being provided with the understanding that it is not intended to be interpreted as specific legal or tax advice. Neither Keever Capital LLC or its employees or agents are authorized to give legal or tax advice. Individuals are encouraged to seek the guidance of their own personal legal or tax counsel.