



PRIMERICA
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FNA Preparation Guide

A complimentary Financial Needs Analysis (FNA) can help you bring your current financial situation to light. It can show you where your finances stand today and what you need to do to prepare for tomorrow.

We are excited about the opportunity to help you establish and reach your financial goals.

The Process Is Easy

Simply have the following documents on hand so we can provide you with an accurate picture of your current financial situation and the steps to reach your goals:

- Recent paycheck stubs
- Savings and investment account statements
- Retirement plan statements
- Company benefit statements
- Life insurance policies
- Mortgage statements (balance, payment breakdown, interest rate)
- Loan and credit card statements (balance, payment, interest rate)
- Education savings statements
- Monthly living expenses (utilities, groceries, entertainment, etc.)

If you have this information online, please pull the needed information before hand to assist in a timely process. We value your time and want to be as efficient and respectful as possible.

If you are unable to locate some of the above information don't worry, we can still begin the FNA process. If you have any questions before our meeting, feel free to contact me. I am looking forward to our visit!