Initial Consultation

What to expect

Our initial consultation is designed to acquaint you with our services, give us an opportunity to understand your unique financial concerns and provide you with specific information regarding our practices and fees. There is no charge for this consultation. The consultation generally takes 1-1.5 hours.

What to bring

The more information you can bring to the initial consultation, the more we can get done at that meeting. However, do not let the task of gathering documents keep you from the more important issue of scheduling an appointment. Bring whatever documents you can readily locate and only those you are comfortable showing at this initial consultation.

- Federal Tax Returns (past two years)
- Most Recent Pay Stubs
- Bank, Brokerage, and other Investment Statements
- Retirement Plan Statements
- Copies of Wills, Trusts, etc.
- Mortgages & Loan Documents (original note)
- Business Ownership Information; Buy Sell Agreements, etc.
- Insurance Policies (life, disability)
- Employee Benefits Statements, Agreements, Booklets
- List of Other Family Assets (i.e., Minor Children's Assets)

How to get here

We are located at **2220 Sedwick Road, Suite 202, Durham, NC 27713**. Take exit I-40 East or I –40 West via Exit # 278 for Hwy 55. Turn right at the bottom of the ramp towards Apex. Pass through the intersection of Hwy 54 and continue until you come to the intersection for Sedwick Road (you will see CVS Drug store on the left). Turn left onto Sedwick. You will cross a railroad track. The office is on the right as you go around the curve. We are in the first building on the second floor, #2220 Suite 202.

We sincerely appreciate your interest and look forward to helping you achieve your financial goals.