



WOLFGANG CAPITAL®

FREQUENTLY ASKED QUESTIONS

- 1 What happens at the first visit? Do I need to bring something?**

We get to know each other, answer any of your questions and find out if it makes sense to see each other again. You only need to bring yourself to the visit. You are welcome to bring financial statements if you have a specific question. Here are some items that may be helpful: Social Security Info, Portfolio Statements, Retirement Account Statements, Insurance Contracts and a Tax Return.
- 2 If I already have a financial advisor, can I work with you?**

We have clients who have had an advisor for 20+ years, just hired an advisor recently or have always handled their own investments. At a very minimum, we can provide you with a second opinion to see if there is room for improvement.
- 3 Is there a charge for meeting with you? How do you get paid?**

No. There is no charge for your first visit or building out your Whole Picture Retirement Plan®. We get paid only if we decide to work together, which is why we are selective about who we take on as a client. If we decide to work together, our fee will depend on the size of your investments. We will provide you with clear information relating to our fees during our first visit.
- 4 Who would benefit from a meeting and what investments do you work with?**

We believe anyone planning for retirement or currently retired will benefit from an initial visit with us. Many of our clients are looking to create an overall retirement plan that focuses on protecting and not outliving their assets. As an independent firm, we do not have a list of products or investments we offer our clients. Every plan we put together is customized to your specific financial needs and we choose investments that we believe are best for your situation. We build and nurture your custom plan so you can enjoy your retirement.
- 5 How long is the first visit and where are you located?**

Typically a complimentary consultation will last about 45 minutes. We have office locations in Temecula, San Diego and Carlsbad.

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