

Given the experiences of the past three+ years, having gone through the COVID-19 pandemic, a financial bear market, several economic challenges, and global unrest; we know many clients are thinking about and in many cases reevaluating their personal and financial priorities.

To that end, we are taking time in 2023 to discuss (or reassess, if appropriate) your priorities to ensure that our work together reflects your values. As you know, the thrust of our overall planning at Stephens Wealth Management Group follows the progression **goals—plan—portfolio**.

- Thus, the primary purpose of our 2023 annual meeting is to establish (or re-establish) that your goals have not changed – or, if they have, to reach a shared understanding of those changes.
- We will then reexamine your financial plan and investment portfolio to make sure it is consistent with your goals.

To support you in thinking through your priorities, we have provided a common list below.

**Priorities/Needs/Wants:**



Travel



College



Home  
Remodel



New  
Home



Major  
Purchase



Wedding



Buy/Sell  
Business



New Car



Leave  
Bequest



Gifts or  
Donations



Other

Please review the priorities list and think about the following:

- 1) What priorities, if any, are missing from the list? Add them for consideration.
- 2) What are your top three to five priorities?
- 3) Of these priorities, have any moved up in importance or in the timeline to be addressed?
- 4) What, if anything, is no longer a priority or has been moved out in terms of a timeline?
- 5) What concerns or obstacles should we be aware of and consider as we think through these priorities with you?

You may want to think through the answer to these questions on your own and then compare it with your partner or discuss the questions together.

We hope that this seems like an intelligent approach to our annual meeting with you and welcome any input you may have.