



# MEET WITH YOUR ADVISOR

**Jared Freese, CLU®**  
**Service Advisor**

Click the meeting you would like to schedule with me below.



## CLIENT CARE MEETING

Prioritize time-sensitive needs and requests, such as discussing recent trades or urgent retirement updates or scenario requests.



## GOALS ASSESSMENT MEETING

Quantify your personal, professional, and financial time- and dollar-specific goals, so we can create recommendations that cater to your desired outcomes.



## SOLUTIONS MEETING

We will share your Goals Analysis (or financial plan) and provide actionable recommendations.



## ONBOARDING MEETING

Review your transitioned accounts, ongoing service commitment to you, and show you how to view your accounts in real time with the GWS Portal.



Jared helps monitor and update GWS client families' financial plans, investment cash, and insurance needs.

