NEW DIMENSIONS
WEALTH MANAGEMENT, LLC.

THE FINANCIAL PLANNING PROCESS

A financial plan is a continual work in progress. You should expect to update your financial plan anytime you need to make important financial decisions and/or at least annually to keep you on track.

During the financial planning process you will need to gather important financial documents such as the ones listed on the next page. Some of these documents will be helpful as you fill out the secure on-line questionnaire. Other documents will be reviewed as your financial plan is being created.

The financial planning process takes approximately 10 business days once you submit your completed questionnaire. The goal is to build something that helps you make decisions, so please do not hesitate to include as much information and as many questions as necessary.

Budgeting – more than 60% of American families do not have a working budget. Don't feel that it is necessary to create one if you don't already have one. If we know how much you earn and how much you save, the rest is what you spend.

Your financial plan will address the following areas:

1. Retirement Analysis
2. Insurance Analysis
3. Estate Planning
4. Tax Planning
5. Portfolio analysis – current and recommended portfolios
6. Employee benefits & education planning – if applicable
7. Everything else that's important to your financial plan

*We do not provide tax or legal advice; however, we will coordinate with your CPA and Attorney to make sure your plan makes sense for you.

FINANCIAL PLANNING CHECKLIST

We will need copies of the following during the financial planning process:

1. Investment Statements	We want to look at the actual statements to see how they are titled and the individual asset information such as price, quantity, cost and ticker symbol.
2. Insurance policies	Life, Health, Home & Auto, Umbrella, Long-term Care and Disability – just the disclosure page in most cases.
3. Tax return	Last filed.
4. Social Security Statements	Most recent.
5. Pension statements	Government, Military, Corporate, Non-profit.
6. Estate Documents	Wills, Trusts, Medical Powers, Ancillary Documents.
7. Beneficiary Designations	Retirement Accounts, Insurance Policies.
8. Employee Benefits/Income	Current paystub, list of employee benefits

Selected as two of the top Financial Planners in Dallas by *D Magazine*
2008, 2010, 2012, 2013, 2014, 2015, 2016, 2017, 2018 and again in **2019**

ABOUT US

New Dimensions Wealth Management represents the culmination of a decade long quest to build a client-centric financial planning firm.

This much we know is true: The Wall Street business model is broken. But that doesn't mean capitalism stopped working, or financial planning for your future is no longer necessary. On the contrary, people need financial planning more than ever, but what they don't need is one-third of their investment return going to the financial industry in fees.

It's really very simple: reasonable fees + exceptional service = valuable financial advice

Lance Alston, CFP®

Education and Designations

Certified Financial Planner (CFP®) designation
Masters of Arts, Economics, George Mason University, Fairfax, Virginia
Bachelors of Arts, International Business, University of Texas, Austin

Other

D Magazine "Best Financial Planners in Dallas" - 2004, 2006, 2008, 2010, 2012, 2013, 2014, 2015, 2016, 2017, 2018 & 2019
Texas Monthly "5 Star Wealth Manager" – 2013, 2014, 2015, 2016, 2017, 2018 & 2019
Advisory Board, *Journal of Financial Planning* - 2010-2012
Media Interviews & Articles – NPR, *Wall Street Journal, New York Times, Consumer Reports, Dallas Morning News, Chicago Tribune, Baltimore Sun, Journal of Financial Planning and Kiplinger's.*

Tiffany Finney-Johnson, CFP®

Education and Designations

Certified Financial Planner (CFP®) designation
Masters of Science, Personal Financial Planning, Texas Tech University, Lubbock
Bachelors of Business Administration in Finance, Texas Tech University, Lubbock

Other

D Magazine "Best Financial Planners in Dallas" – 2008, 2010, 2012, 2013, 2014, 2015, 2016, 2017, 2018 & 2019
Texas Monthly "5 Star Wealth Manager" –2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019

"Financial Planning shouldn't be so complicated, and it certainly shouldn't be so expensive."