

Hi {{invitee_full_name}}

Ryan is looking forward to meeting with you! In order to make your meeting with Ryan Morrissey most productive, it would be helpful to provide us the following documents before your meeting:

- your investment statements,
- budget worksheet, [Download Here](#)
- a net worth statement [Download Here](#)
- your latest tax return,
- most recent paystub, and
- your social security statement (ssa.gov)

We use Box.com for the security of our clients. You can upload your documents securely here: [MWM Secure Link](#)

We think you may find this helpful: [Top 10 Interview Questions When Hiring a Financial Advisor](#)

Did you know Ryan hosts a weekly retirement podcast? Check out [The Retire With Ryan Podcast — M | W | M!](#)

If you have any questions before your meeting feel free to contact me at (860) 881-2091.

Kind Regards,

Cheryl D. Thomas

Client Services Associate

Location: North Haven Office, 116 Washington Ave, Floor 3, North Haven, CT