



Mark G. Deering, CFP®
Executive Vice President
Southwestern Investment
Group

 **615-861-6101**
 615-778-1789

720 Cool Springs Boulevard,
Suite 100,
Franklin, Tennessee 37067

deeringwealthteam.com

Deering Wealth Team is a division
of Southwestern Investment Group.

Investment advisory services
offered through Southwestern
Investment Advisory Services, Inc.,
an independent registered
investment adviser. Securities
offered through **Raymond James
Financial Services, Inc.**, member
FINRA/SIPC. Raymond James is not
affiliated with Deering Wealth Team
or Southwestern Investment Group.

Client Review Sheet

Name: _____

If applicable, updated email(s): _____

If applicable, updated phone(s): _____

Since our last meeting, have you had any major life changes or events?

What are your main goals or topics of discussion for your review meeting?

Please update the following balances:

Mortgage (if applicable): _____

Liquid Savings: _____
e.g. checking, money market

Employer Retirement
Accounts: _____
e.g. 401(k), 403(b)

Other Investments: _____
*e.g. non-qualified deferred
compensation, company
stock, real estate*
