

what to bring to your first appointment

Please bring the following items to your first appointment with your financial advisor.

- [Wealth Management Client Questionnaire](#)
- Most recent statements for any banking, investing and retirement accounts.

Your first appointment is complimentary. Please expect it to last about 45 minutes – 1 hour.

If you need to cancel or reschedule your appointment, please contact us as soon as possible at breannal@veritycu.com or (206) 361-5312.

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