



## HOW DO I WORK WITH PAUL?

### WE START WITH A KICKOFF MEETING:

- The Kickoff meeting is the best way to get started.
- I will take a “financial snapshot” to see if there are any areas that will put you in a better position for both retirement and financial aid. **YOU CAN'T AFFORD FOR EITHER ONE OF THESE TO FAIL!**
- Total cost is \$250 for the Kickoff meeting.

### FOR THE KICKOFF CALL TO MAKE SENSE, THERE ARE TWO REQUESTS THAT I ASK:

1. You have some assets that can be used to plan around (IRA's, Old 401K's, Student Assets, Parental Assets, etc).
2. If I can put you in a better position, be legitimately open to making those changes with me so I could be a part of your financial solution.

**PLEASE NOTE:** *If there are just no assets to plan with or you would never be willing to consider making changes with me, the Kickoff Meeting will not be a good fit for you. If you have any questions, feel free to reach out, I am happy to have that conversation.*

If you don't have a professional to work with to complete any financial aid forms, I can provide resources to you. They will have their own pricing and fees for form preparation. OMH Partner Group is not affiliated or receives any compensation from any outside referrals we would suggest. OMH Partner Group does not complete or file any financial aid forms on behalf of our clients.

I would like to thank you for the opportunity to work with you and your family!

Paul Daly, President OMH Partner Group, Inc.

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# **“What Should I Bring to My Kickoff Meeting”**

- **Please try to bring as many as the pertinent items from the following list below to your meeting.**
  - **If you don't have statements, that's fine. At least know general amounts, who owns the assets, and what type of asset.**
  - **The Kickoff meeting is just a starting point to see if there is anything I can do to improve your situation.**
1. Most recent complete Federal Tax return and W-2's for both parents and student.
  2. Most recent statements or amounts of all checking, savings, CD's or money market accounts for both parents and student. Basically any types of “cash” accounts.
  3. Most recent statements or amounts of all stocks, bonds, mutual funds, 529 Plans, cash value of life insurance, value of any annuities, or any other type of investment that is not included in your retirement plans for both the parents and the student.
  4. Most recent statements or amounts of all IRA's, Simple Plans, Roth IRA's, 401K, 403B, SEP IRA, etc types of retirement accounts for both the parents and the student.
  5. Any child support paid or received for all children or social security received for all children.
  6. Private elementary, junior high, high school, or homeschool tuition paid for other siblings.
  7. If own a home or property, year purchased, purchased price, mortgage amounts, and monthly payment including taxes and insurance.

## **Resources**

### **Financial Aid and Income/Retirement Planning:**

**OMH Partner Group, Inc.**

**Paul Daly, Financial Advisor**

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### **FAFSA & CSS PROFILE FORM PREPARATION SERVICES:**

**John Marcet, CPA**

**630-848-1120**

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