



(551) 222-5997

www.patelswealth.com

Self Assessment

1. Who can benefit from your services?

Anyone looking to protect income, grow wealth, or plan—including individuals, families, professionals, and business owners.

2. Do you offer personalized financial planning?

Yes. Every client receives customized recommendations based on their goals, risk tolerance, and financial situation.

3. How often should I review my financial plan?

We recommend reviewing your plan at least once a year or whenever you experience major life changes such as marriage, a new business, or retirement planning.

4. Are your services available nationwide?

Yes. We serve clients across the United States, subject to licensing and regulatory requirements.

5. Do you offer virtual consultations?

Yes. We offer both in-person and virtual meetings for your convenience.

6. What information should I bring to my first meeting?

Basic financial details such as income, existing insurance policies, investments, retirement accounts, and your financial goals.

7. How long does the financial planning process take?

The timeline varies based on individual needs, but most clients receive an initial strategy within a few meetings.

8. Is my personal and financial information kept confidential?

Absolutely. Client privacy and data security are a top priority at Patel's Wealth.

9. Can I change or update my plan later?

Yes. Financial plans are flexible and can be updated as your goals or circumstances change.



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10. Do you work with families and multiple generations?

Yes. We help families plan across generations, including education planning, retirement, and legacy strategies.

11. Are you affiliated with only one financial company?

No. Through our platform, we work with multiple carriers and financial institutions, allowing us to provide unbiased options.

12. What makes your approach different from banks or online platforms?

We provide personalized, relationship-based guidance rather than one-size-fits-all solutions.

13. Do you help with short-term and long-term goals?

Yes. We help clients plan for both immediate needs and long-term financial security.

14. What happens after my initial consultation?

We analyze your information, discuss recommendations, and help implement solutions aligned with your goals.

15. Can you help me if I already have insurance or investments?

Yes. We review existing plans and suggest improvements or adjustments if needed.

16. Who can benefit from Patel's Wealth services?

Anyone who wants to protect their income, grow their wealth, or plan for a secure financial future including individuals, families, professionals, and business owners.

17. What types of financial services do you offer?

We offer life insurance, retirement planning, wealth building, college planning, business insurance, group term insurance, and investment services, including Invest in India solutions such as converting physical share certificates into digital Demat accounts.

18. Do you provide personalized financial planning?

Yes. Every client receives customized financial strategies based on their goals, timeline, and risk tolerance.

19. Is there a cost for an initial consultation?

No. Your first consultation is complimentary and focused on understanding your needs and goals.



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20. Can you review my existing insurance or investments?

Yes. We provide complimentary reviews to ensure your current plans align with your financial goals.

21. How do I get started with Patel's Wealth?

You can schedule a free consultation by contacting us through our website or emailing info@patelswealth.com.



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