

Case Information Gathering

This is an easy day by day process of collecting the important information needed to help complete your case information statement.

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Day 1 - Call Justin to Schedule Daily Check-ins

“Every great dream begins with a dreamer. Always remember, you have within you the strength, the patience, and the passion to reach for the stars to change the world.”

– Harriet Tubman

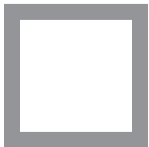
Goal for today:

Call Justin Lotano and pick your time for daily check-ins. 732.576.4020

Check-in calls can be any time between 5:30am and 7:30pm.

The calls will only take 10-15 minutes.

We will review the information items we need to collect for the day, discuss the next day's items and answer any of your questions.



Great job - check day 1 off!

On Eating: Maximize with nutrient-packed foods. Give your body the nutrients it needs by eating a variety of nutrient-packed food, including whole grains, lean protein, fruits and vegetables, and low-fat or fat-free dairy. Eat less food high in solid fats, added sugars, and sodium (salt).

Day 2 - Personal Information/Marriage Timeline

“It takes a lot of courage to release the familiar and seemingly secure, to embrace the new. But there is no real security in what is no longer meaningful.” – Alan Cohen

Goal for today - collect the following information:

Names, addresses and birth dates of you, your spouse and children

Dates of marriage, separation, divorce

List of issues in dispute

Include any agreement that exists between the parties to any issue



Great job - check day 2 off!

On Sleep: Reduce blue light exposure in the evening. Blue light tricks your body into thinking it's daytime. There are several ways you can reduce blue light exposure in the evening. Turn off your cell phone, laptop, tablet, and TV an hour before going to bed.

Day 3 - Income and Taxes

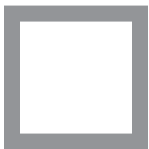
“The only way that we can live, is if we grow. The only way that we can grow is if we change. The only way that we can change is if we learn. The only way we can learn is if we are exposed. And the only way that we can become exposed is if we throw ourselves out into the open. Do it. Throw yourself.” – C. Joybell C.

Goal for today - collect the following information:

Your last 3 pay stubs

Last year's tax returns - state and federal

Include your W-2(s) and your 1099(s) with your taxes



Great job - check day 3 off!

On Sleep: Try to sleep and wake at consistent times. Your body's circadian rhythm functions on a set loop, aligning itself with sunrise and sunset. Being consistent with your sleep and waking times can aid long-term sleep quality. Going to bed late on the weekends and sleeping in will throw your body off rhythm.

Day 4 - Real Property/Assets

“Progress is impossible without change, and those who cannot change their minds cannot change anything.” – George Bernard Shaw

Goal for today - collect the following information:

Real Estate - current values:

- Primary residence
- Secondary residence
- Other real estate

Vehicles - current values:

- Automobiles
- Boat/RV/Camper
- Other

Other tangible property - current values:

- Art/Collectibles
- Furniture
- Jewelry
- Other

Remember, our daily check-in call involves questions as well as you updating me on the status of your work. So if you are not sure about what something means or what you need to do, we can explore that when we speak.



Great job - check day 4 off!

On Sleep: Reduce irregular or long daytime naps. While short power naps are beneficial, long or irregular napping during the day can negatively affect your sleep. Sleeping in the daytime can confuse your internal clock, meaning that you may struggle to sleep at night

Day 5 - Banking & Investments/Assets

“The greatest discovery of all time is that a person can change his future by merely changing their attitude.” – Oprah Winfrey

Goal for today - collect last 3 months of statements for the following information:

Bank accounts

CDs

If statements are unavailable, we can discuss on our call.

Great job so far! You are half way through - and tomorrow is a planned day to take a break!



Great job - check day 5 off!

On Eating: Maximize with nutrient-packed foods - Give your body the nutrients it needs by eating a variety of nutrient-packed food, including whole grains, lean protein, fruits and vegetables, and low-fat or fat-free dairy. Eat less food high in solid fats, added sugars, and sodium (salt).

Day 6 - Investments & Retirement Accounts

“There can be no life without change, and to be afraid of what is different or unfamiliar is to be afraid of life.” – Theodore Roosevelt

Goal for today - collect last 3 months of statements and paperwork for:

Investment Accounts

Retirement Accounts - IRAs, 401(k)s, Pensions

Life Insurance

Other Investments

If statements are unavailable, we can discuss on our call.



Great job - check day 6 off!

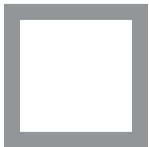
On Stress: Breathe. We do it all day, every day, and yet we often forget the healing powers of deep breathing. By slowing down your heart rate and lowering blood pressure, breathing deeply relieves stress.

Day 7 - Day Off

“Your assumptions are your windows on the world. Scrub them off every once in a while, or the light won’t come in.” – Isaac Asimov

Goal for today:

Relax - nothing for today



Great job - check day 7 off!

On Eating: *Energize with grains - Your body's quickest energy source comes from foods such as bread, pasta, oatmeal, cereals, and tortillas. Be sure to make at least half of your grain food choices whole-grain foods like whole-wheat bread or pasta and brown rice.*

Day 8 - Liabilities

*“You cannot discover new oceans unless you have the courage to lose sight of the shore.”
– Andre Gide*

Goal for today - collect the following information:

Payment amount and total owed for:

Real estate mortgages

Credit cards

Other long and short term debt

Welcome back! One day closer to completion. Remember, I am here to help you through this process.



Great job - check day 8 off!

On Stress: Exercise by Shaking and Dancing. The quickest way to relieve stress is to release endorphins through exercise. An easy way to do this is through shaking and dancing, a form of expressive meditation that loosens your joints as well as clears the mind. Don't feel the need to follow any specific dance moves, just do whatever feels good for you in the moment. Dance for about 5 minutes, or until you feel satisfied.

Day 9 - Monthly Expenses

“Change the changeable, accept the unchangeable, and remove yourself from the unacceptable.” – Denis Waitley

Goal for today - collect the following information:

Other monthly/annual expenses:

Real estate taxes

Homeowners/renters insurance

Utilities - heat, electric, water, sewer

Property maintenance - lawn, snow, etc.

Telephone, internet, home security

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Great job - check day 9 off!

On Eating: Power up with protein. Protein is essential for building and repairing muscle. Choose lean or low-fat cuts of beef or pork, and skinless chicken or turkey. Get your protein from seafood twice a week. Quality protein sources come from plant based foods, too.

Day 10 - Transportation

“Change the changeable, accept the unchangeable, and remove yourself from the unacceptable.” – Denis Waitley

Goal for today - collect the following information:

Other monthly/annual expenses:

Auto payment

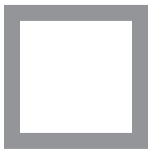
Maintenance

Fuel & Oil

Commuting expenses

Other

Great job so far! Only 3 days left - so start to plan how you'll celebrate when you are done!



Great job - check day 10 off!

On Stress: *Get a good night's sleep. Sleep and stress tend to cause a vicious cycle – if you're stressed, then you can't sleep, which makes you ill-prepared to handle the stressors of the next day, leading to more stress. To relieve stress before bed, try some relaxation techniques and disconnect from technology as much as possible an hour before bedtime. Set a bedtime reminder alarm to ensure the proper amount of rest (7-8 hours).*

Day 11 - Personal Expenses

*“Change is painful, but nothing is as painful as staying stuck somewhere you don’t belong.”
– Mandy Hale*

Goal for today - collect the following information:

Other monthly/annual expenses:

Food & home household supplies

Clothing, hair care, personal care

Health care - co-pays, dental, eye care, etc

Other

Remember, our daily check-in call involves questions as well as you updating me on the status of your work. So if you are not sure about what something means or what you need to do, we can explore that when we speak.



Great job - check day 11 off!

On Eating: Vary your fruits and vegetables. Get the nutrients your body needs by eating a variety of colors, in various ways. Try blue, red, or black berries; red and yellow peppers; and dark greens like spinach and kale. Choose fresh, frozen, low-sodium canned, dried, or 100 percent juice options

Day 12 - Personal Expenses Continued

“Your assumptions are your windows on the world. Scrub them off every once in a while, or the light won’t come in.” – Isaac Asimov

Goal for today - collect the following information:

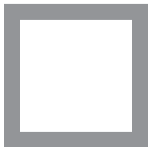
Other monthly/annual expenses:

Day care/educational expenses

Dues and subscriptions

Camps/vacations

Other



Great job - check day 12 off!

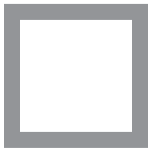
On Stress: *Guided Imagery. Positive, relaxing images can be an effective tool for relieving stress. Search for images of beautiful scenery, or take a trip to the mountains yourself if you have the time.*

Day 13 - Putting It All Together

“It's a funny thing about life, once you begin to take note of the things you are grateful for, you begin to lose sight of the things that you lack.” — Germany Kent

Goal for today:

Call with Justin to complete the Case Information Statement



Great job - check day 13 off!

On Eating: *Don't forget dairy. Foods like fat-free and low-fat milk, cheese, yogurt, and fortified soy beverages (soy milk) help to build and maintain strong bones needed for everyday activities.*

Day 14 - Celebrate!

“Today and onwards, I stand proud, for the bridges I've climbed, for the battles I've won, and for the examples I've set, but most importantly, for the person I have become. I like who I am now, finally, at peace with me...”

— Heather James, Things A Mother Should Know: For The World's Most Important Mum

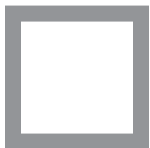
Goal for today:

Celebrate - You're done!

Next steps:

Return this information to your attorney.

If any questions come up regarding your finances throughout the process, call Justin.



Great job - check day 14 off!

On Eating: *Eat well. Eating whole, real foods restores balance and reduces the effects of stress on your body. Replacing harmful substances such as caffeine, alcohol, and refined sugars, with clean proteins, fruits, vegetables, and healthy fats helps regulate your hormone levels, including stress hormones. The gut and brain are constantly sending signals to each other, so by keeping your microbiota (the bacteria in your gut) healthy, your brain feels less stressed.*