

Financial Services Assessment Tool

provided by
Clyde Johnson
CFO and Vice President

Use this handy checklist to help you identify areas of need. Place a check beside each question that describes your situation. As you review the checklist, you will discover items which might require more information. When you finish, contact Clyde Johnson, CFO and Vice President. Please visit the website at www.mettajohnson.com for more information about these and additional services or call him at (404) 376-9571.

Assessing Your Needs

- Do you need help organizing and tracking financial or medical insurance records?
- Do you need help with managing monthly expenses including bill paying?
- Do you need assistance with medical insurance claims?
- Are you in need of Power of Attorney services?
- Do you need help organizing tax documents and other financial paper work?
- Do you need assistance with banking such as balancing the checkbook, maintaining bank records, writing checks, or making deposits?
- Do you need a referral in the Atlanta area to legal, tax or investment professionals?
- Do you need an inventory of holdings prepared for you or your family's records?

Clyde Johnson can help you by providing these services that you or a loved one may need now or in the foreseeable future. Please contact him after completing the checklist at (404) 376-9571 for more information.

We look forward to helping you!

Clyde Johnson
CFO and Vice President