

ITEMS TO BRING TO YOUR MEETING

Social Security Statements

go to www.ssa.gov
Set-up user account
Print off most recent statement

Debts

Mortgage statement
Credit card statement
Vehicle loan statement
Student loan statement

Planned Changes

Housing
Travel plans
Plans to work in retirement
Expected Inheritance

Estate Documents

Health Care Directive
Power of Attorney
Will
Trust
Premarital Agreement

Bringing the following items will help us build a custom retirement plan for you.

List of Current Assets and Statements

(See Information Checklist)
Retirement accounts
401(k)s, IRAs, ROTH IRAs, Defined Benefit Plans
Other income
Rental properties or farm land

Previous Years Tax Return

Insurance Information

Life
Long-term Care
Long-term Disability
Umbrella

Our Services by Life Stage



Saving

ages 25 - 40

- Establish a saving strategy
- Assist with 'big picture' financial goal planning
- Develop long-term investment strategy



Preparing

ages 45 - 60

- Review saving strategy
- Conduct periodic financial reviews
- Evaluate investment mix and risk tolerance



Implementing

ages 65 - 75

- Develop a retirement/income plan
- Prepare Social Security Projections
- Adjust investment risk tolerance for income through retirement