



Build for the retirement of your dreams

At your first financial planning appointment, our priority is to get to know you on a personal level. We believe your financial journey should be as unique as you are, and that starts with a deep dive into your goals and dreams.

Our skilled wealth advisors aren't only number crunchers; they're partners on your path to financial success. By getting to know your unique vision, we can tailor our strategies to align seamlessly with what matters most to you. This isn't just a financial review; it's the beginning of a collaborative journey towards turning your dreams into achievable, measurable goals. Your financial success story starts with a conversation – your dreams pave the way, and we're here to help bring them to life.

What you can expect from your financial plan

With a personalized financial plan, you'll receive an all-encompassing look at the possibilities for retirement. We'll create a plan based on your age and life expectancy, current income and expenses, future income and expected expenses, market returns, and current financial situation.

Ultimately, it will answer the age-old question of "will my finances last me through retirement?"

A blended approach

Our advisors use a sophisticated financial planning tool blended with years of experience to design a tactical plan centered around you and your goals. We'll take an in-depth look at your finances leading into retirement and forecast your post-retirement financial picture to help you prepare for the life you want to build.

Your financial plan will help address common fears and concerns such as health care costs, outliving your money and the best time to file for Social Security benefits. You'll leave your financial review with personalized recommendations for immediate and future actions. These actionable steps will form the foundation of your financial roadmap and give you confidence that you're taking the right steps toward the future you want.



Getting started: Your Financial Planning Checklist

This checklist includes information to help us build your personalized financial plan. While we know it may be difficult to collect every item, please provide as much as possible. We can always add additional details later. At a minimum, we need any statements that include assets, as well as an accurate monthly budget. The details you provide will help us create the most accurate plan for you; we can always add additional details later.

PERSONAL INFORMATION

- ☐ Date of birth (you and your spouse, if applicable)
- ☐ Current income (if employed) and other income
- ☐ Salary (you and your spouse, if applicable)
- ☐ Estimated monthly spending in retirement*

ASSET AND LIABILITY INFORMATION

- ☐ Balances for checking, savings and CDs
- ☐ Account statements (banking, retirement, brokerage, other investment)
- ☐ Pension and Social Security estimates (if applicable)
- ☐ Liability statements (mortgage, vehicle, other)

FUTURE NEEDS AND GOALS

- ☐ Big future spending (new home, vehicle, college, travel)
- ☐ Big future expenses (health care, home maintenance, other)

Retirement planning can be intimidating but it doesn't have to be. We're here to help make your dreams become reality – whatever they look like for you.

*Please review your current monthly spending and determine if any of those expenses will be eliminated after you retire. Your best guess is acceptable. We can adjust the details at any time in the future.

Investments are not FDIC insured, not bank guaranteed, and may lose value.