



Retirement

STRATEGY SESSION

SERVING YOU:

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WHAT TO BRING:

- Most recent employer retirement plan, IRA, brokerage, investment statements

- Pension benefit summary (if applicable)

- Social Security estimate (ssa.gov)

- Any existing annuity and life insurance statements

- Approximate monthly expenses and income

Precise Planning Requires Precise Numbers

We look forward to helping you on your journey to a secure retirement!