



truepeace

FINANCIAL SOLUTIONS

True Peace Annual Review Preparation List

“What To Bring”

We are so excited to be seeing you soon for your annual review and financial plan update! In preparation, please bring the following items with you to your review. (Please note, not all items are applicable to everyone, please disregard anything that does not apply to your plan.)

- If you or a spouse are working, please bring your updated gross income per spouse, as well as the updated percentage you are adding to any work-related retirement plan and the percentage your employer is matching, if applicable.
- Updated Gross Social Security Income Per Spouse (Either what you are currently taking or what the estimate is if you have not yet started your benefits.)
- Gross pension income amounts.
- Updated budget or dollar amount needed to live comfortably each month.
- Any new liabilities or debt. Please bring the balance, interest rate, minimum monthly payment, and actual payment amounts.
- Full most recent statements on all investment accounts not held through True Peace. (No need to bring statements for checking and savings, simply a balance will work.)
- Please bring a voided check if you plan to turn on a lifetime income stream or take a withdrawal from an account held through True Peace.
- Copy of your trust documents, we will need at least the first 10 pages, and the last 10 pages. (Please note this is only if your Trust will be an owner or beneficiary on the account we are opening.)
- Full most recent financial statements of the accounts we are moving. Please make sure the statements are 60 days old or less, include all pages, showing full names and account numbers. (Please disregard if I already have these.)
- Provide an updated summary of your financial goals.
- Any other information you deem relevant to your comprehensive retirement plan update! (Please note, not all items are applicable to everyone, please disregard anything that does not apply to your plan.)

Please let us know if you have any questions!

Sincerely,

Leslie Davis Schoenhofer and your True Peace Family!

