truepeace
FINANCIAL SOLUTIONS

True Peace Appointment Preparation

"What To Bring"

Should You Decide to Take the Next Steps!

We are so excited to be seeing you on your upcoming visit! During our next meeting we will review your proposed plan, educational materials and options discussed, and answer any questions or concerns you may have. In preparation, should *you* decide to take the next steps to move forward and work with True Peace, please bring the following items with you to your visit.

- ☐ Copy of your driver's license
- ☐ Your social security number.
- ☐ Beneficiary Information: (full name, date of birth, address, phone number, social security number, relationship to you, and the percentage of death proceeds to be awarded)
- ☐ 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.)
- ☐ If we are using funds from a pension plan, please bring the pension rollover forms provided by your employer. Please also bring any required proof of identity that is asked to be submitted with your pension rollover documents, by the pension provider (i.e.: Birth Certificate, Marriage License etc.)
- ☐ Voided Check (Should you want to start distributions soon, or take any withdrawals)
- ☐ Provide a summary of your financial goals.

(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 L Davis

Leslie Davis Schoenhofer and your True Peace Family!

7450 W 130th St, #215,
Overland Park, KS 66213

(913) 681 - 2609