PEAKWealth

RETIRE WITH CONFIDENCE

Existing Client Meeting Prep Checklist

Although we have much of your information already, some of it may be outdated or has changed. Please bring the following information with you to the meeting or send it to us prior.

- [ ] Bank balances
- [ ] 401k balance and allocations
- [ ] Latest SS statement (ssa.gov)
- [ ] Latest payroll statement
- [ ] Latest insurance statement (life, disability, long-term care)
- [ ] Retirement goal – age?
- [ ] Retirement spending goal
- [ ] Expense Tracking Spreadsheet (peakwm.com/expenses)
- [ ] Mortgage or Home Equity Statement

CONTACT

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