PERSONALIZED EDUCATION PROGRAM

As a participant, you have access to the following tools to help you work towards financial wellness, as well as pursue your goals for financial success. Please check the appropriate box or boxes below to indicate how we can best serve you.

YES, I'M INTERESTED IN ADDITIONAL SERVICES

Please select the topics you would like to review in a personal appointment with a Wealth Advisor.

- ❑ Retirement Income Projections
- ❑ Insurance Review (Life, Long Term Care, Disability)
- ❑ Educational Savings Plan
- ❑ Estate Plan / Will & Trust
- ❑ Social Security Claiming Strategies
- ❑ Access to Vision[1]
- ❑ I would like to review or adjust the amount I contribute
- ❑ I would like to review or adjust my allocations
- ❑ I have an outside IRA or Retirement Plan that I would like to consolidate

**Securities America, Inc., WealthPLAN Partners and wealth advisors do not offer tax or legal advice or services. Please contact a qualified tax or legal professional for assistance.*

NO SERVICES AT THIS TIME

Please select:

- ❑ The general group Retirement Plan meeting is sufficient for my needs and/or I am comfortable with my current financial plan.

I agree that I have read and checked the box or boxes that apply to my needs (initials): ____________

Name: ______________________________

Date: ______________________________

Please contact me via phone: ______________________________

Please contact me via email: ______________________________