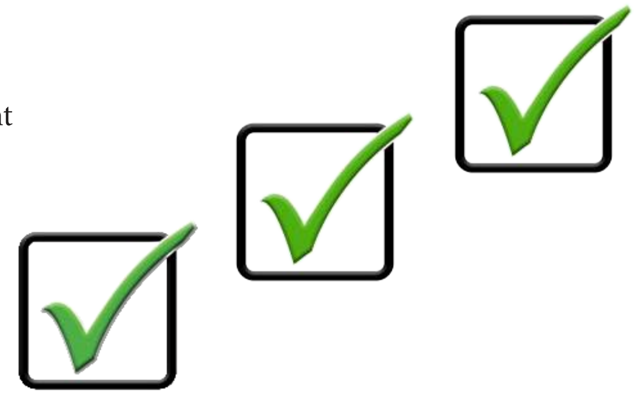
Getting Started with

True Blue FINANCIAL
A REGISTERED INVESTMENT ADVISOR

THE WHY



Common Wealth Management Topics We Discuss

☐ Investments, Qualified Retirement Plans & IRA Management
☐ Retirement Income Planning
☐ Asset Allocation
☐ Insurance Needs Analysis
☐ Liability & Expense Planning
☐ Education Planning
☐ Business Ownership Succession Planning
☐ Tax Reduction Strategies
☐ Titling of Assets & Estate Planning
☐ Gifting to Children, Charity & Descendants

THE WHAT

Common Support Documents We May Need

Investment Statements
☐ Stocks & Bonds
☐ Real Estate Appraisals
☐ Limited Partnerships
☐ Bank Statements
☐ Annuities
☐ 529 Statements

Retirement Plans
☐ IRA & Roth IRA
☐ 401(k), 403(b) & 457
☐ Company Plans
☐ Social Security Statements

Employee Benefits
☐ Pensions
☐ Profit-Sharing
☐ Employee Stock Ownership
☐ Deferred Compensation
☐ Pay Stub

Insurance Policies
☐ Medical
☐ Life
☐ Long-Term Care
☐ Disability

Business Documents
☐ Valuations*
☐ Buy/Sell Agreements
☐ Partnership Agreements
☐ Financial Statements & Tax

Loan Statements
☐ Mortgage
☐ Auto
☐ Credit Cards
☐ Student Loans
☐ Personal Loans & Notes Payable

Expenses
☐ Personal / Family Budget
☐ Annual Spending

Estate Items
☐ Will / Codicil
☐ Trust Agreement
☐ Power of Attorney

Last Year's Income Tax Return

269-982-2710 | www.trueblue.financial