Getting Started with True Blue Financial

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

Employee Benefits

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

Loan Statements

- ☐ Mortgage
- ☐ Auto
- ☐ Credit Cards
- ☐ Student Loans
- ☐ Personal Loans & Notes Payable

Insurance Policies

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

Retirement Plans

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

Business Documents

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

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

7889 Red Arrow Highway, Stevensville, MI 49127 • 667 West Main, Suite A, Benton Harbor, MI 49022