Information Gathering

To help ensure you receive the best financial advice, it is important to complete this to the best of your ability before our first conversation.

Our first meeting is to simply gather information and review your financial situation and concerns about asset preservation, retirement income and taxation. Our purpose is to provide you with a second opinion regarding your financial security.

Please bring the following information for our first meeting:

1. Most recent tax return
2. Most recent Pay Stubs
3. Investment Statements for IRA's, SEP IRA's, 401(k), 403(b), 457, TSA's and any pension policies
4. Social Security estimate of benefits for both you and your spouse
   a. Recent statements/paystubs from Social Security and/or Pensions if applicable
5. Life Insurance Policy Information
6. Mortgage Statement
7. Copies of wills, trusts, powers of attorney
8. Estimated monthly budget
9. Copies of Drivers Licenses
10. Dates of Birth
    a. _____/_____/_____
    b. _____/_____/_____

All information is kept STRICTLY CONFIDENTIAL. After our first meeting, we will prepare personalized reports and recommendations on your retirement goals.

We look forward to the potential of forming a long-term relationship based on trust and mutual respect.

ALL-INCLUSIVE FIDUCIARY RETIREMENT PLANNING

866.360.2724 | 322 W Main ST | Suite 216 | Tilton, NH 03276 | www.theivyag.com

Investment advisory services offered through The Ivy League Advisory Group, LLC (Tilton, NH, 866-360-2724) a Registered Investment Advisor registered in the state of New Hampshire and Vermont.

Budget Worksheet

For annual items estimate the monthly cost.

HOUSING:

	Mortgage	
	RE Taxes	
	Homeowners Insurance	
	HOA Fee's/Dues	
	TOTAL	

UTILITES:

	Electric	
	Gas/Oil	
	Water/Sewer	
	Telephone	
	Cable	
	Internet Provider	
	Cell Phone	
	TOTAL	

HEALTH/MEDICAL:

	Health Insurance	
	Dental	
	Co Pays	
	Eyeglasses	
	TOTAL	

TRANSPORTATION:

	Car Payments	
	Car Insurance	
	Car Mainenance/Repair	
	Gas	
	Parking/Tolls	
	Inspection	
	TOTAL	

CREDIT CARDS/LOANS:

	Credit Card Balances	
	Credit Card Minimums	
	Student Loans	
	Alimony/Child Support	
	TOTAL	

FOOD/ENTERTAINMENT:

	Groceries	
	Meals Out	
	Entertainment	
	Hobbies	
	TOTAL	

PERSONAL:

	Dry Cleaning	
	Personal Grooming	
	New Clothing	
	TOTAL	

SAVINGS/LARGE EXPENSES:

	Life Insurance	
	Savings	
	Gifts	
	Charity	
	Home Repairs/Maint	
	Vacation	
	TOTAL	

EXPENSES TOTAL:

How to Obtain Your Estimate of Benefits

How to Obtain Your Estimate of Benefits

1. Go to http://www.ssa.gov.
2. Click on the text "SIGN IN/UP" at the top right of the page.
3. Click the box "my Social Security."
4. Create your account by verifying your identity and creating a username and password.
5. Once you are logged into your account after setting it up you will be able to print/save a pdf of your Social Security Statement. This is the file we will need to run our reports.
6. In some rare cases, certain taxpayer's information is not available online. If this is the case for you, call the Social Security Administration (SSA) at 800.772.1213, and a SSA representative will provide you with all the information you need. Ask, "What is my Primary Insurance Amount at Full Retirement Age?"