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. List Executor/Trustee & Secondary Executor/Successor Trustee named in your Will and/or Trust
9. List persons named in financial and healthcare powers of attorney.
10. Estimates monthly budget
11. Copies of Drivers Licenses
12. 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.

530 E Hunt Hwy Suite 103 #480, San Tan Valley, AZ 85143

322 W Main St, Suite 216, Tilton, NH 03276

ALL-INCLUSIVE RETIREMENT AND ESTATE PLANNING

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:	

ALL-INCLUSIVE RETIREMENT AND ESTATE PLANNING

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?”

theivyag.com 603-899-7572

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About Us

We are a Retirement & Estate Planning firm dedicated to your success. We provide **holistic** advice in a **Fiduciary** capacity that:

- Strategically details where to take your retirement income from and when.
- Plans strategically to minimize risks in your investments.
- Ensures your estate planning goals are met.
- Optimizes Income Tax & Social Security Benefits.

Retirement & Estate Planning Made Easy

Brandon Archibald ***Founder & Principal***
Brandon is the founder of The Ivy League Advisory Group, an investment advisory firm that helps clients plan for a successful retirement, minimize investment risk, optimize taxes & social security, and provide comprehensive estate planning services through a national partnership. As Principal, Brandon has developed a unique process that integrates an individual's circumstances and goals into a proprietary system. This system uncovers opportunities often missed by others, highlighting ways to minimize investment risk and taxation, increase income in retirement, and enhance overall financial security. Having made the move from the Northeast to the Southwest, he enjoys traveling around the West, including the High Desert and Sierra, and lives with his wife and daughter in the Phoenix Valley.

Peter Laufenberg ***MBA, Investment Advisor & Retirement Planner***
Peter is an investment advisor representative and retirement plan designer for the Ivy League Advisory Group. When not helping clients achieve their financial goals, Peter serves in many roles within his local community. He serves as President and Chair of the Board of Directors for Mid-State Health Center and is finance chair of his Parish Finance council. Peter also serves as a Selectboard chair in the Town of Thornton. For his work in the community and previous work at Plymouth State University, he was recognized by The Union Leader as one of the 40 under 40 young professionals in New Hampshire in 2016. Most importantly though, he serves as husband to his wife and father to his two daughters.

Markus Cole ***Operations Manager***
Markus became part of our team in early 2019, serving as our Operations Manager. With a background in business development, account management, public speaking, and digital marketing, Markus plays a crucial role in overseeing our internal processes, ensuring the security of client information, maintaining high compliance standards, and ensuring the firm maintains a progressive trajectory as it continues to meet the needs of its clients in an ever-evolving financial system. Alongside Brandon and Peter, he strives to deliver exceptional, customized retirement planning solutions. Outside of his professional responsibilities, Markus has a passion for traveling, volunteering, and adventuring–having hiked in the fjords of Norway, the fiords of New Zealand, and the Himalayas of northern India. Including being able to speak four languages, Markus continually seeks out new learning and experiences.

Katrina Ann ***Compliance & Operations Assistant***
Katrina joined our team in late 2023. Having served four years in the military in communications while stationed in Germany and South Korea, she later moved into the dental field as a hygienist for several years, and has worked many years as a certified ESL (English as a second language) teacher. As our Compliance & Operations Assistant, she plays an important role in ensuring our internal processes are compliant through record-keeping and periodic information review. Some of her interests include traveling and enjoying the outdoors–from hiking high up or scuba diving down low. She has had the pleasure of visiting several countries abroad and speaks two languages.

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