

**Strategy Session Confirmation**

Thank you for attending your local AFEA’s class! This is a confirmation that we have you are scheduled for a strategy session with your local AFEA instructor on:

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Location: <<<Office address >>

<<<Office phone number >>

Your Strategy Session is intended as an extension of the class and an opportunity to get to get help on any financial questions you may have. The coach at his/her discretion, will offer Free Reports to aid in helping you with your questions. The scope of the Free Reports will dictate the information you should bring to your Strategy Session.

**Required Documents: Optional Documents:**

AFEA’s Monthly Budget Worksheet Most Recent Retirement Account Statements

-Pre & Post Retirement -401k, IRA, Brokerage, CD’s, etc

Balance Statement of Total Financial Worth Any Insurance Policies

Recent Social Security Statements -Life, Health, Disability, etc

-Pension Info if Elected or not Paystubs – One full monthly cycle worth

Directions from <<Option1>>:

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