

**Strategy Session Confirmation**

Thank you so much for attending our Social Security Benefits Workshop.

This is a reminder that we have you scheduled for a strategy session on:

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

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

Our office is located at:

This meeting is for information gathering and understanding only. Please bring your most recent Social Security statement(s) and complete page 10 in the work book titled “What Are Your Current Income Needs. However, if you would like to make the meeting more productive you may bring any of the following items, if applicable:

* Any insurance policies (Life, health, disability)
* Most recent Brokerage statements
* 401k statement (If applicable)
* Monthly Budget (page 10)
* Paystubs (3 weeks)
* Last two years tax returns.

Directions from      : Directions from      :