Thank you so much for attending the class. This is a reminder that we have you scheduled for a strategy session for:

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

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

Our Office is located at: 0000 ABCD LANE, SUITE #600

Charlotte, NC 00000

For questions or to reschedule, please call \*\*INSERT INSTRUCTOR NAME OR ASSISTANT NAME & PHONE NUMBER HERE\*\*

As an extension of what you learned in the class, this meeting is for information gathering and understanding only. 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.
* 401(k) statement (If applicable)
* Monthly Budget (Page 19)
* Paystubs (3 weeks)
* Last two years tax returns
* Most recent Social Security Statements

**Requirement for Attendees of Social Security Workshops:**

In order to receive a free and accurate Social Security Timing Report, please bring your most recent Social Security statement(s) and complete page 24 in the workbook titled, “Budget Worksheet.”

Directions from <<Option1>>:

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