

200 East Main Street, Palmyra, 717-838-3168 tnsfg.com

PA 17078

**CHECK-IN / REVIEW MEETING**

NAME(S): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DATE: \_\_\_\_\_\_\_\_\_\_\_\_

**Questions & Updates:** We’ll review any questions you have and get updated on your life.

**Nuts & Bolts:** Here we’ll go through account verification, beneficiary review, retirement contributions & distributions, RMDs, etc. (this is the boring-but-important part of taking care of you)..

* Review Accounts/Verification
* Review Beneficiaries
* Review Retirement Plans/Contributions
* Review Insurance Plan
* RMD needed?
* Any questions about anything?

**Investments:** Here we’ll discuss progress toward your goals, allocation, risk, investment research and recommendations, etc.

**Planning & Goal Review:** This is the fun part, where we’ll check in on your goals and dreams, talk about new life events, discuss updates to your plan, taxes, etc.

* Updated SS Statements and Driver’s License updates
* Get your picture taken!
* Next Client Event
* Next: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_