

Please read the important details below to help you fully prepare and get the most out of your consultation.

WHAT TO EXPECT:

This meeting is a no charge follow-up to class for students with questions specific to their finances and how class information may apply to their situation. Typically, this is an hour meeting, although we will allow more time as needed so you do not feel rushed. This is a private one-on-one meeting with Peter. He will discuss your retirement goals, answer any questions you have, and explain his approach. He will also evaluate your current financial picture against your retirement goals, share his insight and recommendations. Peter holds a Series 65 License and adheres to the Fiduciary standard and ethics prioritizing *your* best interest in any interaction.

PREPARING FOR YOUR APPOINTMENT:

In order to provide you with a *personalized* assessment, please bring the following items to assist Peter in understanding the full scope of your finances. (Your documents will be returned to you.)

The [Budget Worksheet](#) is VERY important. It will be linked in the appointment invitation email for you to print and fill out before your appointment. You can also request a separate copy by contacting the office.

- **Last year's tax return**
- **Copies of any insurance policies (life or annuity)**
- **Full statements of all holdings and investments.** *(All pages please!)*
- **Broker statements: all investment accounts, 401k -current or former, IRAs, mutual funds, stocks, annuities, etc.**
- **Bank statements: CDs or savings, checking, or money market accounts**
- **Your most Current Social Security Statement**

ADDITIONAL INFORMATION:

- Please note that it is beneficial that both parties of a 'financial couple' be present at our initial meetings. We respectfully ask that you schedule when both parties can attend.
- We will make a reminder call to you the day before your appointment.

LOCATION AND DIRECTIONS:

Our address is [1S660 Midwest Rd in Oakbrook Terrace](#). We are in **Suite 305** on the third floor. As a landmark, we are **in the Comar Building between Honey Jam Café and BP**. We have plenty of free parking at the main entrance, which is at the back side of the building. Take the lobby elevator to the third floor and turn all the way to the Right to find us.

Should you have any questions at all, please do not hesitate to call the team at 630-480-4301.

We look forward to seeing you!

