EBERST WEALTH MANAGEMENT

Early retirement planning

Your conversation worksheet

Use this page to collect your thoughts before speaking with Bruce. Keep it for yourself; do not include account numbers, passwords or other sensitive information. A first conversation does not require completed paperwork.

The years between

When I would like to leave full-time work

Income milestones and dates to verify

Household spending, healthcare and tax allowances

The decisions to check

Accounts I could access and rules to confirm

Health coverage options and enrollment deadlines

What I could change if costs rise or markets fall

My conversation with Bruce

Written work and alternatives I want to compare

Questions for my tax and benefits professionals

Scope, fees and review schedule to agree

Preparation guide only; not individualized investment, legal or tax advice, a recommendation, or a completed financial plan. Services, deliverables and fees are agreed separately.

eberstwealthmanagement.com/services/early-retirement-planning
Bruce Eberst · (561) 276-1544 · September 13, 2026