EBERST WEALTH MANAGEMENT

Retirement income 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 life I want to support

My retirement timing

People who depend on this plan

Everyday needs and flexible goals

My income picture

Income sources to discuss

Accounts and savings to include

Large expenses or changes ahead

Questions for Bruce

What assumptions should we examine?

What written work and review schedule would be included?

What fees and next steps would apply?

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/retirement-income-planning

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