



# Meeting Agenda

**Client:**

**Date:**

## **GENERAL INFORMATION**

- Privacy Policy
- IIG Services
- IIG Fees & Payment Information

## **TAX PLANNING**

- Paycheck Evaluation
- Tax Return Evaluation
- Tax Preparation

## **DEBT ELIMINATION DISCUSSION**

- What is your current debt status? Target Zero Debt
- Mortgage Evaluation
- Debt Evaluation
- Credit Repair

## **PORTFOLIO EVALUATION**

### **CASH RESERVES**

- 2-6 times your monthly budget in reserves
- Ameritrade Money Market

### **GROWTH STRATEGIES**

- Portfolio Evaluation
- TSA/IRA/457 Plan/401(k) Evaluation
- ROTH IRA Planning
- Market Risk Discussion
- College Planning
- Distribution Planning

## **RISK MANAGEMENT**

- Life Q&A
- LTC Q&A
- Home & Auto Q&A
- Health Q&A
- Med Sup Q&A

## **RETIREMENT PLANNING**

- Social Security/Other Buyback Evaluation
- Beneficiary vs. Co-beneficiary Evaluation
- Option # 1-2-3 Evaluation
- Payment Strategies
- Working vs. Retirement Pay
- Medical Options
- PERA Retirement Packet discussion
- Social Security Retirement discussion

## **ESTATE PLANNING**

- Will & Estates Q&A
- Avoid Probate
- Asset Protection Strategies