New Frontier
Wealth Management

Thank you for the opportunity to earn your business. This could be one of the most important steps to secure your retirement and leave a legacy for your loved ones.

Our first meeting is to simply gather information and review your financial situation and concerns about asset preservation, investments, life insurance and long-term care insurance. Our purpose is to provide you with a second opinion regarding your "financial security."

Please ensure you have the following information for our first meeting:

1. Last year's tax return
2. Insurance policies (life and long-term care)
3. Statements for IRAs, SEP, 401(k), 403(b), 457, TSAs, any pension policies
4. Investment and bank statements, including CD certificates
5. Credit union statements
6. Annuity policies
7. Statements for stocks, bonds, mutual funds (brokerage accounts)
8. Listing of savings bonds and treasury bonds
9. Social Security statement
10. Deeds for real property
11. Copies of wills, trusts, Power of Attorney and any legal documents so we can forward to an Elder Law Attorney for review.*

All information is kept STRICTLY CONFIDENTIAL. After our first meeting, we will prepare personalized reports and recommendations based on your unique retirement goals.

I look forward to forming a long-term relationship based on trust and mutual respect.

* Only a qualified Estate Planning Attorney can advise you on the need of estate planning documents.