



**A F E A**  
American Financial Education Alliance

## **Strategy Session Confirmation**

Thank you for attending your local AFEA's class! This is a confirmation that we have you scheduled for a strategy session with your local AFEA instructor.

***\*Please confirm this time or give us the courtesy of rescheduling as we have reserved this time for you\****

**Call 937-853-7527 or email [lindsey@securefutureadvisor.com](mailto:lindsey@securefutureadvisor.com)**

Location: 4489 Far Hills Ave. Kettering, OH 45429

**Your FREE STRATEGY SESSION is intended as an extension of the class and an opportunity to get help on any financial questions you may have. Proper education is combining information & knowledge, resulting in wisdom. There is no obligation or expectation from the AFEA coach(s).**

For specific information regarding your individual situation, it may be helpful to bring the following information to your **FREE STRATEGY SESSION**:

1. Recent Social Security Statement – visit [www.ssa.gov](http://www.ssa.gov), select 'my Social Security' to set up account
2. AFEA's Monthly Budget Worksheet (Workbook Appendix)
3. AFEA's Unexpected changes to income or expenses (Workbook Appendix)
4. Other Sources of Retirement Income – compile information and/or statements on:
  - a. Retirement Accounts (401(k), IRA's, Pension plans, Annuities, CD's, etc.)
  - b. Any Insurance Policies (Life, Health, Disability, etc.)
5. Paystubs – last 30 days
6. Most recent Tax Return
7. Questions for your Coach (Workbook Appendix) – Use this page to write down any questions or concerns that come to mind before your Strategy Session