

## **Life Transitions Toolkits Disclosure**

Investment advisory services offered through Prosperity Wealth Planning LLC ("PWP"), a registered investment adviser. Registration does not imply a certain level of skill or training. This checklist is provided for general informational and educational purposes only and is not intended as individualized investment, tax, legal, or financial advice. The information presented within is general in nature and may not apply to your specific circumstances. Any financial planning or investment advisory services are provided by PWP pursuant to a written advisory agreement. Tax laws and regulations are subject to change, and their application depends on individual facts and circumstances. You should consult your own tax, legal, or other professional advisors regarding your specific situation.