

Meet William Goldaris, Financial Advisor, Vice President, Wealth Management:

- + More than 20 years of experience as an investment professional
- + Chartered Retirement Planning Counselor (CRPC)
- + Extensive knowledge of Thrift Savings Plans (TSP), 401(K), 403(B), Simple/SEP IRAs, Traditional/Roth IRAs and pension plans
- + Licensed agent for Life, Disability, and Long-Term Care Insurance
- + Holds a B.S. in Economics from the University of Minnesota and a M.A. in Economics from the University of Chicago
- + Served as an adjunct professor at the University of St. Thomas Opus College of Business

When not at work, Bill enjoys running, lifting weights, biking, roller skating and gourmet cooking. Bill has also visited 38 countries.



Ready to meet with William?

Schedule an appointment by calling (952) 736-5085 or visit [TruStone.org/Investments](https://www.trustone.org/Investments).
View the following page for a printable list of items as you prepare for your first meeting.

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PREPARE FOR YOUR FIRST MEETING



While not required, bringing the following items when you meet with TruStone Financial Advisors may be helpful:

Most recent statements from the following (with beneficiary designations, if applicable):

- Investment accounts:
 - Traditional IRA
 - Roth IRA
 - Brokerage accounts
- Annuity statements and contracts

Details of employee benefits:

- Health insurance with premiums: (e.g. Medical, Dental, Vision)
- Life insurance
- Disability coverage (short- and/or long-term)
- Long Term Care

Your personal insurance contracts, with premium amounts, coverage, and beneficiary designations:

- Life insurance: (e.g. Term, Whole, Variable/Indexed/Universal Life)
- Disability coverage (short- and/or long-term)
- Long Term Care

Other items:

- Driver's License or other government-issued photo identification
- Recent statements from your employee retirement accounts (e.g. 401k, 403b, 457, MNDGP, SEP-IRA, TSP)
- Employee retirement plan sponsor Summary Plan Document (SPD)
- Pre-retirement projections of pension payments and/or balances, including survivor options
- If you are within 10 years of retirement, your Social Security Administration projections (or current statement from website)

Helpful information to know:

- A basic understanding of your:
 - Monthly expenses
 - Bank or credit union account balances
 - Insurance policies
- Knowledge of your assets and their values
- Knowledge of your liabilities/debts
- Knowledge of your taxable income amount

Have questions?

Call (952) 736-5085 // Email Jaelyn.Fish@cunamutual.com // Complete the contact form at TruStone.org/Investments