Meet Dan Guibert, LPL Investment Advisor Representative:

- Holds Series 7 and Series 66 registrations through LPL Financial
- Licensed with the MN Department of Insurance as a Life and Health Insurance Agent
- Provides comprehensive financial planning and investment advice
- Specializes in retirement planning, college-cost planning, tax-advantaged investing and wealth transfer strategies

When not at work, Dan enjoys exploring Minnesota with my wife and dog, Zero; reading; golf and the Minneapolis Orchestra. Along with your financial future, he is happy to discuss NHL hockey and your favorite craft brewery.

Ready to meet with Dan?
Schedule an appointment by calling (763) 270-4354 or visit **TruStone.org/Investments**.
View the following page for a printable list of items as you prepare for your first meeting.

TRUSTONE FINANCIAL
Investment Services

PREPARE FOR YOUR FIRST MEETING

TRUSTONE FINANCIAL Investment Services

While not required, bringing the following items when you meet with TruStone Financial Investment Services 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, MNDCP, 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 (763) 270-4354 // Email Brenda.Anderson@LPL.com // Complete the contact form at TruStone.org/Investments