



SECURE FINANCIAL
M A N A G E M E N T
WE MAKE RETIREMENT HAPPEN[®]

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Thank you for your interest in Secure Financial Management. Below is a list of data to gather for your first consultation with us:

- Any online access to employer's benefits (e.g. pension, 401(k), 403(b), 457, etc.)
- Any investments you currently have
- Any debt or spending expenses you currently have
- The dollar amounts you will receive from Social Security at ages 62, 67, and 70 (you can go to ssa.gov to register and look up these amounts)
- Estimated income needed after retirement
- Estimated medical cost you will have after retirement

Secure Financial Management is now located at:

4630 De Zavala Rd
San Antonio, Texas 78249

We look forward to meeting you!