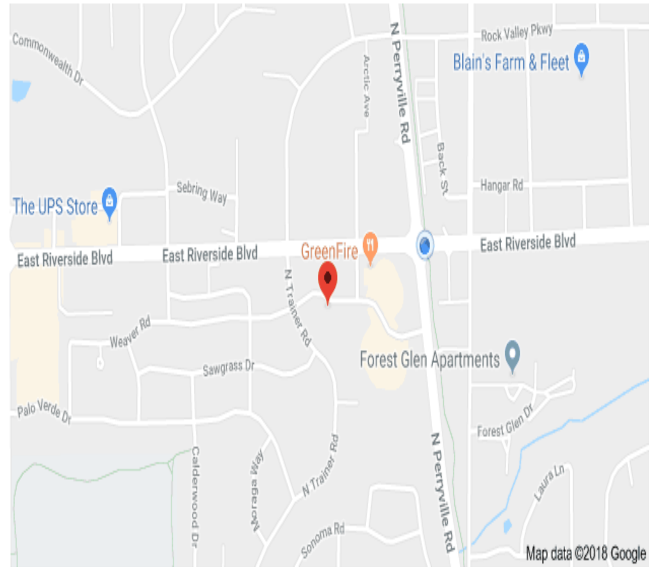
What's Next...What Should I Bring?

Rockford Retirement Planning Inc.



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Just bring the info you can

What's next...what should I bring?

During our meeting, our first step will be to gather information that will be helpful in familiarizing us with your particular situation. Therefore, it would be helpful for you to have available:

1. Copies of wills, trusts, powers of attorney, and any legal documents.
2. Copies of insurance policies, (life, health, auto & home).
3. Copies of investment statements, bank statements, social security statements, etc.
4. Copies of last year's tax return (and possibly a balance sheet or financial statement).
5. A basic guess by you of your annual expenses.

Please note that if you do not have these items available or if it is difficult to obtain this information, or if you don't feel comfortable giving out this information, you can simply give us a rough idea and we'll simply take notes.

All information is kept strictly confidential; it is not disseminated or distributed in any shape or form. You are not obligated toward us and we will not ask you to buy anything. Once we've gathered the information, we'll prepare a personalized financial report with any recommendations we might have.