



NFP Financial Guidance Meet with a Financial Professional

Thank you for registering for a one-on-one meeting with NFP!

Your session is tailored to your personal financial goals — from retirement planning and budgeting to insurance, home buying, estate, and investment strategies.

To make the most of your time, please bring the following or enter it online via the Elements QR code:

Income & Savings:

- Annual salary and net take-home pay (paycheck)
- Other income (spouse, rental, investment, etc.)
- Retirement plan contribution percentage & employer matching percentage
- Current investment balances (401(k), IRA, Roth, annuities, etc.)
- Savings/cash account balances

Retirement Planning:

- Social Security benefit estimates (ages 62, full retirement, 70) – ssa.gov
- Pension amounts (if applicable)

Debt & Expenses:

- Total current debt
- Monthly housing expenses (rent/mortgage, property taxes, HOA, insurance)
- Loan payments (auto, student, personal)
- Credit card balances and payments
- Other fixed monthly expenses (utilities, subscriptions, etc.)

If your spouse's financial information is relevant, please bring that as well.

Contact Us:

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952-960-9055

Uline Financial Guidance Website:

<https://financialed.nfp.com/uline>



We are excited to assist you on your journey to financial well-being! Enter your information into Elements:

