Tony Walker FINANCIAL.COM

RETIREMENT PLANNING SPECIALIST CHECKLIST

Services Offered & Credentials of Tony Walker	TWF	Other Advisors	
Complete Access & In-Person Appointments with the Owner	✓		
Number of Appointments with Savers	15,000		
Number of Game Plans Personally Written	4,000		
Free Social Security Analysis	✓		
Free Tax & Fee Analysis/Planning	✓		
Free 'What If' Scenarios (with Tony)	✓		
Free Estate Planning Guidance & Assistance	✓		
Investment Management Fees	0.6%		
Amount of Annuity Premiums Written to Date	$350 Million		
Ratio of Full Service Staff to Fiduciaries	5:1		
Local, One-Stop Shop for All Your Retirement Planning Needs Estate Planning, Life, Long-Term Care, Medicare Supplement, & Final Expense	✓		

Under penalty of perjury, the above mentioned are true as of the date of my signature.

Tony Walker 9/17/19

Tony Walker Date

Your Other Advisor Date

Your Other Advisor Date