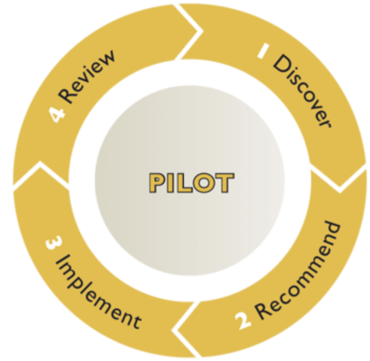
ARS
AVIATION
RETIREMENT
STRATEGIES, LLC

READY TO GET STARTED?

SEE BELOW FOR OUR WEALTH PLANNING CHECKLIST



☐ Call ARS with any questions you may have and to set up your initial consultation.
281-272-2229 (IAH)   877-272-2201 (toll-free)

☐ Estimate Your Retirement Benefits. (A-Plan / B-Plan / 401(k) / Other Personal Investments
For assistance, you may contact us at 281-272-2229 or 877-272-2201. (ARS can streamline this process for you at no charge)

☐ Complete Pilot's Monthly Expense Worksheet (Included In Your Packet)
This worksheet will help provide initial guidance on what kind of income will be needed for you and your family while in retirement. This worksheet is also a supplement to the ARS Fact Finder.

☐ **Complete the Fact Finder & Estate Planning Worksheet** (Please contact ARS to receive via email or FedEx at no charge)
If you have further questions or need additional assistance, contact us at 281-272-2229 or toll free at 877-272-2201

☐ Return the Fact Finder & Estate Planning Worksheet with all relevant documents to ARS
We will review your information and contact you for any additional information as needed (within one week).

Mail To KIAH Location: Aviation Retirement Strategies, LLC.
17725 John F. Kennedy Blvd, 2nd Floor
Houston, TX 77032
or
Email Us at: retire@pilotmoney.com

(Call us and we will send you a Pre-Paid FedEx label)

☐ ARS will call you to schedule a review of your:
- Current Financial Information
- Goals and objectives during retirement
- Airline Benefits (A-Plan, B-Plan, 401(k), etc.)
- Other outside investments
- Estate Planning documents

☐ ARS will complete your Retirement Wealth Plan
We usually meet with our prospective clients at least three to four times to complete this process

☐ Review your Retirement Wealth Plan and verify all data for accuracy

☐ Implement your Retirement Wealth Plan

Your Privacy Is Important To Us

Aviation Retirement Strategies, LLC. and its family of affiliated companies are committed to maintaining the trust and confidence of all clients. We want you to understand how we protect your privacy when we collect and use personal information in the course of business, as well as the measures we take to safeguard your information. Keeping customer information secure and private is a priority at Aviation Retirement Strategies, LLC.

Keeping your information secure is one of our most important responsibilities. We restrict access to your non-public personal information to those employees and agents who are providing products or services to you. We maintain physical, electronic and procedural safeguards that comply with federal standards to guard your non-public personal information. We do not sell, share or disclose your non-public personal information to non-affiliated third-party marketing companies.

For more information, please contact our office at (281) 272-2229.