



## Schorpp Capital Management, P.C.

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[www.schorppcapital.com](http://www.schorppcapital.com)

### **The Schorpp Capital Management 401k Consulting Service**

#### What we need from our client.

We will first interview the client via the telephone or a personal interview in our office. This interview should last no longer than 30 minutes. At this interview we will collect personal information along with specific details about the clients 401k plan. The personal information we will need will consist of age, desired age of retirement, risk tolerance, present salary and typical annual raises. In regards to your 401k information we would like to have a copy of your most recent statement (our fax number is 732-247-6881). Next, we would like to know all the choices available in your 401k plan, please fax this information.

#### The service our client will receive.

1. We will evaluate your present portfolio. We will then evaluate the other choices you have in your portfolio. Based upon your age, your desired age of retirement, and your risk tolerance we will recommend adjustments to you portfolio.
2. We will estimate your Social Security benefit based on your present salary and an estimated raise value. Please note that SS benefits are estimates only. To learn more about your Social Security benefits visit the official website of the Social Security Administration at [www.ssa.gov](http://www.ssa.gov).
3. Based upon your portfolio and future contributions we will estimate the potential value of your 401k. Remember past performance is no indication of future results and this is only an estimate.
4. We will then determined if you will have enough in your 401k to meet your retirement goals. This determination will be based exclusively on your 401k and your SS benefits. If there are any other retirement benefits that you will have we will add them to our calculations.
5. Last, we will make recommendations to you on how to meet your goals if you are not already meeting them.
6. You will receive a report based on our findings along with our recommendations.

This service is available for \$200 and in most cases requires five business days to finish from the time we receive all of the pertinent information. If you would like to take advantage of this service or have any questions please call Douglas Schorpp at 732-247-0939 x21.