Complimentary Consultation Checklist

Having access to several financial documents should make for a productive complimentary consultation.

If you don't have one or two of the documents, don't worry.

YOU are the most important item to bring to the consultation. During the meeting, we can discuss your financial situation and develop a strategy to access the information needed to complete the review.

Here's a list of the documents to consider bringing:

- ☐ Financial statements from investment accounts
- ☐ Information from 401(k), 403(b), or other employer-sponsored plans
- ☐ IRA documents
- ☐ Statements from pension plans
- ☐ Bank checking and savings accounts
- ☐ Most recent federal tax return
- ☐ Policy documents for any outstanding insurance programs
- ☐ Wills and trust documents
- ☐ _____
- ☐ _____
- ☐ _____

Your appointment is scheduled for:

_____ Date

_____ Time