



THE BROWNING GROUP II, LLC

Initial Consultation Checklist

- Most Recent Tax Return
- Investment Statements
 - Non-qualified (Individual, Joint, Trusts, etc.)
 - Qualified (IRA's, 401k, 403b, Pension, etc.)
- Insurance Policies and Recent Statements
 - Life Insurance, Disability Insurance and Long Term Care
- Estate Documents
 - Wills, Trusts and Power of Attorney
- Recent Pay Stub
- Employee Benefits
- Social Security Statement (can be accessed at www.ssa.gov)

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Securities offered through Kestra Investment Services, LLC (Kestra IS), member FINRA/SIPC. Investment Advisory Services offered through Kestra Advisory Services, LLC (Kestra AS), which is an affiliate of Kestra IS. The Browning Group II LLC is a member firm of PartnersFinancial. Kestra IS and Kestra AS are not affiliated with The Browning Group II LLC or PartnersFinancial.