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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