Appointment Checklist

Creating a strong retirement plan requires a complete snapshot of your financial situation. To complete the picture, please remember to bring these items to your appointment.

Statements

- ☐ All bank and credit union accounts
- ☐ Mortgage
- ☐ Brokerage and investment accounts (stocks, bonds, 529 plan, etc.)
- ☐ Annuity/IRA/401(k)
- ☐ Social Security
- ☐ Life insurance/long-term care

Income

- ☐ Pay stubs
- ☐ 1040 tax return

Miscellaneous

- ☐ CPA and estate planner contact information
- ☐ Copies of power of attorney and trust documents

Questions? Please contact:

Name

Phone Number

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