

Appointment Checklist

Things to bring with you:

- Investment Accounts**
Current statements showing value and positions (stocks, bonds, mutual funds, CDs, money markets, etc.)
- Bank Accounts**
Current statements showing value and positions (CDs, money markets, etc.)
- A list of your other assets**
Homes, personal property, collectibles, etc.
- A list of your liabilities**
Debts, mortgages, loans, etc.
- Life insurance policies**
Life, long-term care, etc.
- Social Security information**
Statements you may have received with an estimate of earnings at retirement
- Current contributions**
401(k)s, IRAs, savings accounts, etc.
- Annuity information**
Cash flows, income, savings, etc.
- All sources of income**
Salaries, pension plans, annuities, trust funds, rental income, etc.
- Tax return paperwork**
From previous two years

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Senior Vice President/Investments

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