

PLEASE BRING THE FOLLOWING ITEMS
TO YOUR FIRST APPOINTMENT

- | | |
|---|---|
| <input type="checkbox"/> Recent Paycheck Stub | <input type="checkbox"/> Life Insurance Policies |
| <input type="checkbox"/> Income Tax Return (1 year) | <input type="checkbox"/> Disability Insurance Policies |
| <input type="checkbox"/> Recent Social Security Statement (ssa.gov) | <input type="checkbox"/> Long-term Care Insurance Policy |
| <input type="checkbox"/> Most Recent Account Statements (Please Bring Full Quarterly/Monthly Statements) | <input type="checkbox"/> Real Estate Debt |
| <input type="checkbox"/> Estate Plan Documents (Will, Trust, Power of Attorney, etc.) | <input type="checkbox"/> Consumer Debt (Car, Credit Card) |
| <input type="checkbox"/> Auto Insurance Declaration Pages | OTHER: |
| <input type="checkbox"/> Home Owners Declaration Pages | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Personal Liability (Umbrella Policy) | <input type="checkbox"/> _____ |
| | <input type="checkbox"/> _____ |

DISCUSSION TOPICS:

1.

2.

3.

