

Appointment Checklist

WE HAVE COMPILED A LIST OF COMMON DOCUMENTS, STATEMENTS, ETC. PLEASE REVIEW AND BRING THE CORRESPONDING DOCUMENTS TO YOUR NEXT APPOINTMENT OR REVIEW.

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INCOME SOURCES

Current income and income sources (year end employer W2s should be with your tax information)

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SOCIAL SECURITY BENEFITS

Most recent social security benefit statements.

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INVESTMENT INVENTORY

Stocks, bonds, mutual funds, annuities, brokerage accounts and other securities (with cost basis)

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PRIMARY RESIDENCE PROPERTY VALUE & MORTGAGE INFORMATION

(mortgage statement i.e. market value, outstanding balance, loan rate and maturity date (with cost basis)

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NON-PRIMARY RESIDENCE PROPERTY OWNED

Mortgage statement i.e. market value, outstanding balance, loan rate and maturity date.

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OUTSTANDING LOAN STATEMENTS

i.e. auto, credit card, etc.

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BUSINESS ASSETS

Inventory of business assets or fair market value of business enterprises with cost basis.

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FINANCIAL INSTITUTION STATEMENTS

i.e. checking account, savings and certificate of deposit statements.

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TAX RETURNS

Tax returns for the past two years.

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LEGAL DOCUMENTS

i.e. wills, trusts, durable power of attorney, etc.

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LIFE INSURANCE POLICIES

Most recent annual statements.

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LONG TERM CARE INSURANCE POLICIES

Most recent annual statements

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POTENTIAL PENSION INFORMATION

i.e. monthly benefit, beginning age, survivorship and inflation adjustments.

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DESIRED RETIREMENT AGE(S)

You can choose more than one age. Include details of any "semiretirement". (i.e. At age _____, retire to _____ days a week, with a reduced income of \$_____ until full retirement at age _____.)



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