



**I AM LOOKING FORWARD TO MEETING WITH YOU.
PLEASE BRING THE FOLLOWING ITEMS TO OUR NEXT MEETING.**

<input type="checkbox"/>	The enclosed worksheet completed
<input type="checkbox"/>	A list of assets and liabilities (terms of liabilities)
<input type="checkbox"/>	Investment statements/reports (i.e. bank, annuities, mutual funds, brokerage accounts)
<input type="checkbox"/>	Employer's benefit statement and/or booklet
<input type="checkbox"/>	Last year's tax returns (both federal and state)
<input type="checkbox"/>	Last month's pay stubs
<input type="checkbox"/>	Personal life and long-term disability insurance, annual statements and policies
<input type="checkbox"/>	Wills and other trust documents
<input type="checkbox"/>	Other

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