CORNERSTONE
FINANCIAL SERVICES, LLC

FIT MEETING DOCUMENT CHECKLIST

- ☐ Rough Outline of Monthly Expenses, Summary Preferred
- ☐ Brokerage Account Statement(s), most recent Stocks, Bonds, Mutual Funds/ETF
- ☐ Long-Term Care Insurance Statement
- ☐ Life Insurance Statement(s), Most Recent
- ☐ Annuity Statements
- ☐ Retirement Accounts: IRA, 457, 403B, 401(k), most recent Statements
- ☐ Other assets (i.e.-Real Estate, Oil & Gas, Precious Metals, Art, Settlements, Buyouts, etc)
- ☐ Pension Statements
- ☐ Social Security Statement
- ☐ Other Investment or Retirement Account Statements
- ☐ Current Checking and Savings, CD Amounts
- ☐ Partnership and/or Business Ownership Statements
- ☐ Copy of Will/Trust
- ☐ Employment Benefits Description
- ☐ Summary of Liabilities/Debt
- ☐ Names and contact information of individuals who provide you with advice related to your finances (Attorney, Accountant, Banker, Insurance Agent, etc)

PRIVATE WEALTH MANAGEMENT // ESTATE PLANNING // CORPORATE STRATEGIES