SecondHalf Coach Wealth Management

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## What to Bring to Your Appointment

- ☐ **Driver's License** for both you and your partner
- ☐ **Account Statements** (dated within 3 months) for any accounts being transferred
- ☐ **Paperwork or correspondence** you have received from current accounts in order to initiate transactions or with which you require the advisor's assistance or explanation
- ☐ **Employer's current retirement plan options** for review with the advisor
- ☐ **Checkbook** of account being used to fund investment account(s): We can NOT accept cash, money orders, or endorsed third-party checks for forwarding.
- ☐ **Void Check** for bank account that you would like to link to your investment account(s) for direct deposit or systematic withdrawals/deposits
- ☐ **Beneficiary information**: full name, address, phone number, date of birth, and social security number are all required to put a beneficiary in place
- ☐ **Trusted Contact information**: A trusted contact is *not* someone who is authorized to make decisions on your behalf or receive information about your accounts. A trusted contact is (1) someone that our office can contact in the instance that we need to reach you and are unsuccessful in finding you or (2) someone who we can contact to discuss your well-being if we become concerned about your capacity to act on your accounts in your own best interest.
- ☐ **Employer's rollover paperwork** if you are initiating a rollover of retirement plans to an IRA
- ☐ **Trust documents** if applicable
- ☐ **Power of Attorney** documents
- ☐ **Previous year's tax return** if requested by the advisor