**Existing Client Suggested Checklist for Annual Review:**

- Will, POA (Financial and Healthcare), Trust/Estate
- Latest Taxes
- Retirement/Benefit/Pension Plan, held at work (past and current employment)
- Updated Salary/Income (2 most recent paystubs)
- Social Security Statement
- Loan/Car/Bank Statements
- Beneficiary Information (Name(s)/DOB/SS#)
- Anything you’d like to discuss to your meeting