

Pre-meeting Checklist

Codrea Financial Services www.codreamfinancialservices.com 614-452-8185

Please bring complete information about all savings and investment accounts with you including:



- _____ Bank statements: (Checking, Savings accounts and Certificates of Deposit)
- _____ Investment accounts (Stocks, Bonds and Mutual Funds)
- _____ All loans and mortgages (including interest rates and monthly payments)
- _____ All credit card statements (including interest rates, current balance and minimum payment information)
- _____ All retirement plans (401k, Profit Shaing, IRA, ROTH IRA) especially the last report on the value of your employer's retirement plan.

Please bring the following additional documents with you:



- _____ All life insurance policies on every member of your family
- _____ All disability or income protection policies
- _____ All annuity contracts
- _____ Employee benefits (including retirement plan, life and/or disability insurance policies)
- _____ Most recent annual pension report
- _____ Your last federal income tax return
- _____ Pay stubs
- _____ Homeowner & auto policies (declaration page or summary)
- _____ Will, trusts, durable or healthcare power of attorney.