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APPOINTMENT CHECKLIST

What to Bring to Your Next Appointment

Your Pre-Appointment Checklist

To better serve your financial planning needs, please provide the following statements and/or documents to our office prior to your scheduled meeting:

- Other Investments
- Life Insurance
- Disability Insurance
- Long-Term Care Insurance
- Social Security
- Employer Sponsored Retirement Plans
- Bank Statements
- Last Year's Tax Return
- Will, Trusts or Power of Attorney

Simply provide this information to Michael Mann by either:

FAX:

701-483-1101

MAIL or DROP-OFF:

683 State Avenue, Suite H
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We enjoy the opportunity of serving you and we look forward to seeing you soon!