EAGLE RETIREMENT GROUP, LLC

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Initial Consultation Checklist:

In order to make an accurate financial evaluation and to determine proper recommendations, we will need copies (or the originals) of all *checked* items in the **Need to Furnish** column below. This form will also serve as your receipt for all documents submitted to us and checked in the **Received** column.

Received	Need to Furnish	
_________	________	Income Tax Returns for the past two (2) years
_________	________	Paycheck stub(s) for you unless ones' retired
_________	________	Loan or Real Estate Investment Documents
_________	________	Will(s) and Trust(s) documents
		All insurance policies, including all declaration pages for the following:
_________	________	1) Car Policy
_________	________	2) Disability Policy
_________	________	3) Homeowner's or Renter's Policy
_________	________	4) Hospitalization and Major Medical Policies
		5) Life Insurance Policies (for all immediate family members)
_________	________	A. Dividend Statements
_________	________	B. Policy Loan Statements
_________	________	6) Any other types of insurance policies
_________	________	Company-provided Group benefits for you. Please include a print-out of specific coverage and benefits, if available
_________	________	List and last statement of currently owned investments (Brokerage accounts, IRA, 401(k) Plans, Annuities, etc)
_________	________	Estimate of Monthly Living Expenses
_________	________	Net Worth Statement (or other information regarding all current assets and liabilities)

Please provide any other documentation which you believe would be helpful in the accurate evaluation of your current financial situation.