

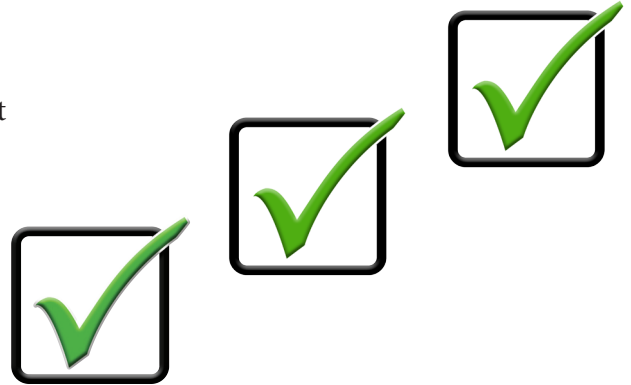
Getting Started with



THE WHY

Common Wealth Management Topics We Discuss

- Investments, Qualified Retirement Plans & IRA Management
- Retirement Income Planning
- Asset Allocation
- Insurance Needs Analysis
- Liability & Expense Planning
- Education Planning
- Business Ownership Succession Planning
- Tax Reduction Strategies
- Titling of Assets & Estate Planning
- Gifting to Children, Charity & Descendants



THE WHAT

Common Support Documents We May Need

Investment Statements

- Stocks & Bonds
- Real Estate Appraisals
- Limited Partnerships
- Bank Statements
- Annuities
- 529 Statements

Retirement Plans

- IRA & Roth IRA
- 401(k), 403(b) & 457
- Company Plans
- Social Security Statements

Employee Benefits

- Pensions
- Profit-Sharing
- Employee Stock Ownership
- Deferred Compensation
- Pay Stub

Insurance Policies

- Medical
- Life
- Long-Term Care
- Disability

Business Documents

- Valuations*
- Buy/Sell Agreements
- Partnership Agreements
- Financial Statements & Tax

Loan Statements

- Mortgage
- Auto
- Credit Cards
- Student Loans
- Personal Loans & Notes Payable

Expenses

- Personal / Family Budget
- Annual Spending

Estate Items

- Will / Codicil
- Trust Agreement
- Power of Attorney

Last Year's Income Tax Return

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* LPL Financial does not provide business valuations.