ADVISORY GROUP

Initial Consultation Checklist:

- ✓ Most recent federal tax return
- ✓ All investment statements & retirement statements
- ✓ Information from 401(k), 403(b), or other employer sponsored plans
- ✓ Statements from pension plans
- ✓ Social security statements
- ✓ Any other statements that would be pertinent to your current financial state
    - Mortgage statement
    - Credit card statements
- ✓ Bank checking and/or savings account statements
- ✓ All insurance policies and statements
    - Medicare Supplements
    - Long-Term Care
    - Life Insurance
- ✓ Copy of trust (If Applicable)