IIS FINANCIAL SERVICES

Insurance - Investments - Retirement Planning

Financial Planning Meeting Checklist

- **Most Recent Tax Return**
- **All Recent Investment & Retirement Account Statements**
  - Annuities, Bonds, Mutual Funds, Stocks, etc.
  - IRA's: Roth, SEP, Simple, Traditional
  - Employer Retirement Plans: 403(b), 401(k), 457(b), etc.
  - Brokerage and Bank Account Statements
  - 529(s) - College Savings Plans

- **Most up to date Social Security or Pension Statement**
  - Contact Maine PERS if you contribute to the Pension as a Public Sector employee or request it at the below website:
    - http://www.mainepers.org/ASP/ContactMainePERS/InformationRequest.aspx
  - Contact current employer if you have a pension in the private sector and request your benefit calculation estimate statement
  - For Social Security go to https://www.ssa.gov/ to gather a copy of your estimated future retirement benefits

- **All Insurance Policies and Statements**
  - Long-Term Care
  - Life Insurance
  - Disability

- **Copy of Trust (If Applicable)**

- **Beneficiary information**
  - Includes DOB, SSN, address and telephone number

- **Government Identification**
  - Driver's License

707 Sable Oaks Drive, Suite 203
South Portland, ME 04106

45 Memorial Circle, Suite 104
Augusta, ME 04330

Toll Free: (800) 640-8787
http://www.iisfinancial.com/contact