Items to Gather for First Appointment

Option A: For specific Tax and Financial Planning options, you may want to have the following reviewed;

Complete Financial Planning Form

Provide copy of most recent income tax (1040) return

Bring the following statements:

- Bank Accounts
- IRA/401K Retirement Plans
- Stock/Mutual Fund portfolio summaries
- Insurance policies: long term care, life and disability
- Bring copies of Wills, Trusts, Durable Powers of Attorney, Living Wills

All information is confidential. Please no social security numbers or account numbers. We request only enough information to show what options or alternatives may be suitable for you.

Option B: Bring just your seminar booklet. We will be happy to discuss any general questions you may have.