Areas We Will Discuss During Our Wealth Management Meeting

Please bring any statements or documents for the following areas ----

Investments

- Stocks, Savings account, 401K/Retirement plan
- Education accounts
- Collectibles, Emergency fund

Tax/Accounting

- Tax Returns - Personal and/or Business
- Estimated Payments, Other Accounting

Retirement Income

- Social Security Income, Pension Income, Annuity Statements

Insurance

- Life, Long term Care, Disability, Health
- Auto, Homeowners/Renters, Specialty (RV, boat)
- Business Insurance, Annuity Review

Estate Planning

- Trust, Living Will
- Power of Attorney, Beneficiaries

Debt

- Mortgage, Credit Card, Student Loans, Medical, Auto, Other

Other

- Monthly budget

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