Client Checkup

By having the most current information about your personal and financial conerns and situation, I'm better able to provide you with comprehensive financial planning and advice.

- ☐ Recent Statements from your Employer's Retirement Plans (401(k), Profit Sharing, Stock Purchase Program, 403(b))
- ☐ Recent Statements from any 529 / College Savings Plans
- ☐ Copy of all Insurance Policies (Life Insurance, Disability, Long Term Care) Home & Auto
- ☐ Tax returns (year end)
- ☐ Copy of your most recent Trust(s) / Will(s) / Power of Attorney Documents

What are your most important financial concerns at this time?

What about non-financial conerns?

Have any changes taken place? (i.e. major purchase, birth, death, inheritance, illness, even email?)

Questions for ANDY?

If possible, please give me this information a few days prior to our meeting.