Initial Appointment Checklist

- ✓ Recent financial statements for your bank, retirement and non-retirement accounts
- ✓ Information on life and long term care insurance coverage and annuities
- ✓ Social Security benefits
- ✓ Information on any pension income, stock options or deferred compensation
- ✓ A list of your annual personal income and expenses
- ✓ A copy of your Will and Trust
- ✓ A copy of your latest personal (and if applicable, corporate) tax returns
- ✓ A list of any specific questions or areas of concern