Appointment Checklist

To make our meeting productive, please bring any/all of the following that you would like to discuss

_____ Mutual Fund Statements

_____ Brokerage Account Statements

_____ Retirement Plan Statements (410 k, 403 b, IRA, Roth IRA, Keough, etc)

_____ Bank Account Statements (CD's, Savings, etc.)

_____ Annuity Statements

_____ Life Insurance Policy Statements

_____ Current Tax Return

_____ Long Term Care Insurance Policies

_____ Disability Income Insurance Statements

_____ Pension Statements

_____ Company Benefits

_____ Social Security Statements and Documents

_____ Legal Documents – Will, Trust, Power of Attorney, Guardianship, Special Needs Documents, etc.

Please bring a check for $297 made payable to ***LPL Financial*** for your meeting (Discounts may apply)

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