

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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