

APPOINTMENT CHECKLIST

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



_____ **Mutual Fund Statements**

_____ **Brokerage Account Statements**

_____ **Retirement Plan Statements (401k, 403b, 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**

_____ **Pension Statements**

_____ **Social Security Statements**

_____ **Legal Documents (Wills, Trusts, Power of Attorney, etc.)**

Thank you!

Securities registered associates of Maryland Financial Advocates are Registered Representatives and Investment Adviser Representatives with securities and investment advisory services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC. Registered Representatives of LPL Financial may transact securities business in a particular state only if first registered, excluded, or exempted from Broker-Dealer, agent or Investment Adviser Representative requirements. Current states are MD, VA, PA, FL, DE, WA.

Maryland Financial Advocates and LPL Financial are separate and unrelated companies

MARYLANDFINANCIALADVOCATES.COM
410-663-0700
9621 HARFORD ROAD, FIRST FLOOR
BALTIMORE, MD 21234

SECURITIES & FINANCIAL PLANNING OFFERED THROUGH LPL FINANCIAL, A REGISTERED INVESTMENT ADVISOR, MEMBER FINRA/SIPC