APPOINTMENT CHECKLIST

Please gather as much of the following as possible for your first appointment:

1. **Personal Info:**
- Social Security Numbers
- Driver's Licenses
- E-Mail addresses
- Mailing address

2. **Family Information:**
- Full legal names, birthdays & social security #'s of all children

3. **List all Debts:** (credit cards, car payments, leases, personal loans, home equity, etc.)
   * ***Most recent statements showing:***
- Current balances
- Interest rates
- Minimum payments

4. **Insurances:**
   **Policy summary pages*
- Homeowner's
- Auto Policy
- Health/Long Term Care
- **Life Insurance Policies**
- Group Coverage Costs

6. **Banking/Investment:**
   **Most recent statements for:*
   Checkings, savings, IRA's, mutual funds, retirement accounts, annuities, pensions, etc.

5. **Income Information:**
- Employer's name & address
- **Last year's income tax returns**
- **2 most recent pay stubs**
- Social Security estimates
- Pension income
- Military income

6. **Housing/Rental Information:**
- Present value of home
- **Current mortgage statement & balance**
- Property taxes
- Monthly rental expense

7. **Estate Planning:**
- Name of Attorney
- Will & Trust documents
- Beneficiary designations
- CPA or Tax Accountant

8. **Businesses Owned:**
- Business Names & Addresses

- Business Tax Returns & Name of Accountant

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