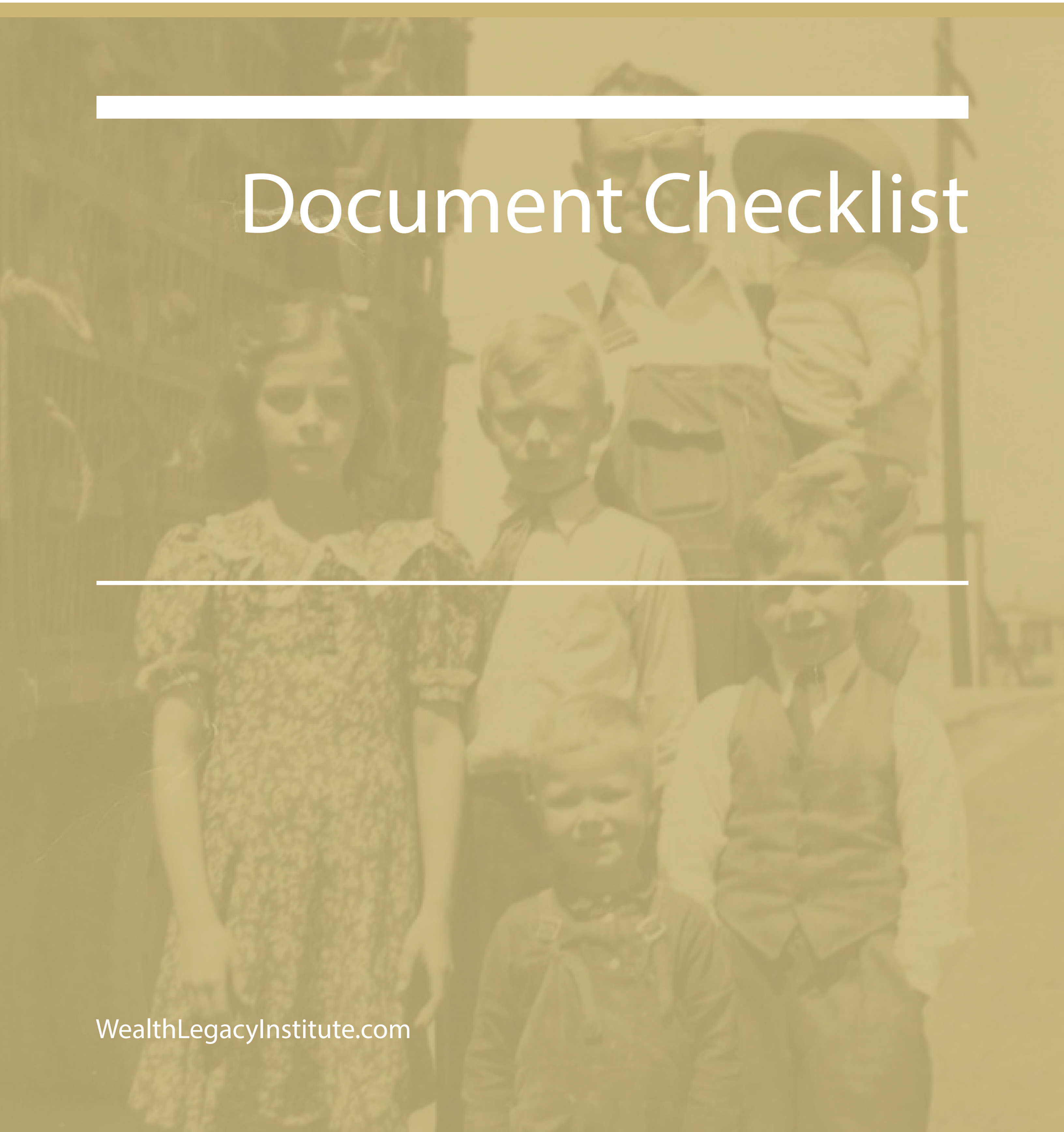
Wealth Legacy Institute



Document Checklist

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Document Checklist:

Items to Send Prior to your Meeting

Preparing will make your time most productive in our initial financial advisory consultation.

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1. Latest **paycheck stubs, bank and credit card** statements
2. Federal and State Income **Tax Returns**- last 3 years
3. **Mortgage** and other loan information and liabilities
4. **Insurance** Policies (or Declaration Page): Life, Diability, Long Term Care, Automobile, Homeowners, Medical, Rental
5. **Investment** Statements: 401(k), IRA, stocks, bonds, annuities, mutual funds
6. Most recent **employee benefit manual**. If applicable, ask your benefit department to print you a projection on your pension benefits at different ages (e.g. 55, 60, 62, 65).
7. Any information on **unique financial events** or situation such as major purchase, expected inheritance, business sale
8. Latest **wills and trusts** statements, prenuptial agreements, divorce decrees, etc.
9. **Social Security** Estimates: http://www.ssa.gov/retire/estimator.html

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Clarity, Confidence Peace of Mind

Thanks for Reading

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