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Securing a Lifetime of Financial Integrity by helping you grow and protect what you've spent a Lifetime creating.

These are a few things that we will be discussing during our visit; not a necessary requirement. I also have a few points of information for you as well.

✓ **General Information**

- Income & Expenses Estimates
- Current Debt's with % Rates & Balances
- FREE credit reports: www.AnnualCreditReport.com

✓ **Investment Statements**

- 401K, 403B, 457B, etc.
- Pensions
- IRA's
- Brokerage Accounts
- Any other investment statements

✓ **Social Security Statement**

- Don't mail annually to everyone any longer
- Go register at: www.ssa.gov/mystatement/
- Print-out your latest statement or we can go online together to review

✓ **Will Document Information** (need to be discussed w/ lawyer)

- General Will with Executors & Alternates
- Power of Attorney (PoA)
- Medical Power of Attorney
- Directive to Physicians
- Other items may include Trusts, ILITs, etc. per Lawyer's advice

God Bless...

Paul