



**KIRK WARD**  
FINANCIAL ADVISOR  
PHONE: (580) 336-1010  
FAX: (580) 336-5568  
WWW.MYNOBLEADVISORS.COM



## APPOINTMENT CHECKLIST

Date: \_\_\_\_\_

Time: \_\_\_\_\_

- **INVENTORY LISTING AND/OR CURRENT STATEMENTS**

Showing your stocks, bonds, savings bonds, mutual funds, annuities (with cost basis if possible).

- **INVENTORY OF OTHER ASSETS**

Including residence, other real estate, personal property, and business assets with fair market value and cost basis (if possible.)

- **PAST (2) YEARS OF INCOME TAX RETURNS**

- **MOST RECENT SOCIAL SECURITY BENEFIT STATEMENTS**

- **LEGAL DOCUMENTS**

(i.e. wills, trusts, durable powers of attorney, etc.)

- **INVENTORY OF LIFE INSURANCE POLICIES**

With most recent annual statements

- **INVENTORY OF LONG TERM CARE POLICIES**

with most recent annual statements

- **POTENTIAL PENSION INFORMATION**

i.e. monthly benefits, beginning age, survivorship and inflation adjustments

- **DESIRED RETIREMENT AGE(S)**

*Include details of any "semi-retirement" plans*

At age \_\_\_\_\_, I want to retire to \_\_\_\_\_ days per week  
with a reduced income of \$ \_\_\_\_\_ until full retirement at age \_\_\_\_\_