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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 _____