STIFEL | Kletschke Wealth Management Group

We are looking forward to the opportunity to meet with you! This check list is a list of items to bring to your appointment. These are suggestions to help make your appointment go smoothly and to help us get a better picture of your overall financial situation. Please note that not all these items may apply to you and your spouse/partner, but please bring what you can. If you have any questions in advance, please contact us!

Thank you!

Kim, Korey, Wendy, Erin, Jess & Ben

APPOINTMENT CHECKLIST

- ☐ Most recent investment statements, including former employer retirement plans
- ☐ Most recent statement of company stock ownership plan and details
- ☐ Current employer-sponsored retirement statement, including investment options and their historical performance

  Your Current Contribution Rate: ____________________ Employer Match: ___________________________

  Spouse/Partner Current Contribution Rate: _________ Employer Match: ___________________________
- ☐ Most recent statement of current or former employer-sponsored pension plan projections
- ☐ Most recent annuity statements
- ☐ Maturity dates and balances of certificates of deposit (CDs)
- ☐ Trust, will, power of attorney, healthcare power of attorney, and related estate planning documents
- ☐ Social security numbers, dates of birth, addresses, and cell numbers of any individual you may consider naming as beneficiaries (for any entity, bring tax ID#, organization's legal name, and address)
- ☐ A check marked **VOID** from your primary checking account
- ☐ Most recent life insurance statement, including details on any employer-sponsored life insurance – include beneficiaries
- ☐ In-force disability and/or long-term care insurance policies
- ☐ Last year's tax return
- ☐ Most recent Social Security Statement (www.SSA.gov)

INCOME

Your Annual Income: $______________________________ Your Employer: ______________________________________

Spouse/Partner Annual Income: $ ____________________ Spouse Employer: ___________________________________

ADDITIONAL ANNUAL INCOME SOURCES:

Source: ____ Amount $: ____

Source: ____ Amount $: ____

Source: ____ Amount $: ____

Source: ____ Amount $: ____

FINANCIAL ASSETS	VALUE	INSTITUTION
Checking Account		
Savings Account		
Money Markets (held outside brokerage accounts)		
Restricted Stock		
Deferred Compensation		
529 Plans or College Savings Accounts		
ADDITIONAL FINANCIAL ASSETS:		

DEBT	CURRENT BALANCE	INTEREST RATE	MONTHLY PAYMENT	PAY-OFF DATE
Mortgage				
Vehicles				
Credit Cards				
Student Loans				
ADDITIONAL DEBT:				

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