



STRATEGIC INVESTMENT SERVICES

14248 SW 158 Path, Miami, FL 33196
305.234.0003 Fax 877.202.0004

www.StrategicInvestmentServices.com



INVESTMENT CHECKLIST

Personal Info:

- List of questions you have (goals & objectives)
- Any pertinent information on family members (Names, DOB, SS#)
- Any investments ie 401K, 403B, FRS, IRA, 529 plan, etc
- All insurance info (ex. Life, Health, Disability, Insurance)

Info To Bring or Send:

- Budget Information
- Bank Accounts Information
- Mortgage Info, Notes
- Taxes
- Will, Trust, Power of Attorney etc
- Investment info (IRA, Retirements, Mutual funds , Stocks, Children's investments, etc)

*** Not all information is required, but it allow me to help you with **YOUR Financial Future***

Find BEST time to get together below:

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Sincerely,

Daniel J Bellina, RFC