To get the most out of your financial review, please provide the following information prior to your appointment:

✓ Completed / Revised Forms

- ☐ Risk Tolerance Questionnaire
- ☐ Net Worth Worksheet
- ☐ New Account Form

✓ Budgeting & Income

- ☐ Personal Monthly Budget
- ☐ Federal Tax Return – Most Recent
- ☐ State Tax Return – Most Recent
- ☐ Social Security – Estimated Benefits or Income, if Retired
- ☐ Paystub – With Details of Withholdings & Deductions

✓ Statements for Assets Held Outside NFG– Most Recent

- ☐ Checking & Savings Accounts
- ☐ Investment Accounts
- ☐ Mutual Funds
- ☐ Retirement Plans (+ year-end)
- ☐ Pension Fund

✓ Statements & Policy Details for Assets Held Outside NFG

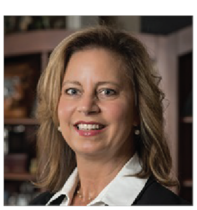
- ☐ Annuities
- ☐ Insurance – Life, Health, Long-Term Care, Disability, & Umbrella

✓ Estate Planning Documents

- ☐ Last Will & Testament
- ☐ Revocable Living Trust
- ☐ Durable Power of Attorney
- ☐ Health Care Power of Attorney
- ☐ Advance Directive
- ☐ Guardianship

✓ Updates and Questions

- ☐ Since we last met, have you reached any major milestones?
- ☐ What are your goals?
- ☐ What questions do you have?



NITHMAN FINANCIAL GROUP

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