RIDGETOWN
INVESTMENTS
Randy Schmidt, CFP®

Initial Consultation Checklist

To better service your financial planning needs, please provide the following statements and/or documents to our office at the time of or prior to your scheduled meeting:

Assets

- ☐ Checking, Savings & CD Balances
- ☐ Investment Statements
- ☐ Retirement Account Statements
- ☐ Social Security Statements
- ☐ Pension Statements

Loan Statements

- ☐ Mortgage
- ☐ Auto
- ☐ Student Loans
- ☐ Business Loans

Protection

- ☐ Life Insurance Policies
- ☐ Long-Term Care Policies
- ☐ Legal Documents – Will, Trust, Power of Attorney, etc.
- ☐ Medicare Supplements (if applicable)

Other

- ☐ Previous Year’s Tax Return