New Client Information Checklist

PLEASE BRING THE FOLLOWING TO OUR PLANNING MEETING:

- [ ] Copy of will(s) and/or trust agreement(s)
- [ ] Copy of durable power(s)-of-attorney
- [ ] All insurance policies
- [ ] All annuity policies, including recent statements
- [ ] All long-term care policies
- [ ] The previous year's federal & state income tax returns
- [ ] Paycheck stubs for the last TWO pay periods
- [ ] Certificates of deposit (CDs), including rates and due dates
- [ ] Most recent social security benefits statement
- [ ] Mutual fund, individual stock, and bond statements
- [ ] Statements from all retirement plans (IRA, KPERS, SEP, 401K, pension, or other profit sharing plans

GIVE SOME THOUGHT TO THE FOLLOWING QUESTIONS:

- What is your current take home pay?
- Would your current take home pay be enough for retirement income?
- How often do you receive pay raises from your employer? How much?
- For the purposes of the Financial Plan, what age would you like to use for retirement age and life expectancy?
- Do you have any large spending goals coming up? Do you have any large spending goals in retirement?

785- 309-7007 | info@bewealth.com | bewealth.com
1041 S Ohio St, Salina, KS 67401