P. ANN WAGNER
Financial Counseling and Planning

CHECKLIST OF WHAT TO BRING:

(only bring those items pertinent to your consultation needs)

- Completed Financial Questionnaire (email prior to visit, if possible)
- Latest paycheck stubs and bank statements
- Most recent investment statements, retirement statements
- Latest employee benefit statements
- Insurance policies or summary of coverage statements for life, disability, automobile, home, major medical, nursing home, rental property, umbrella, LTC
- All pertinent information regarding mortgages or loans (i.e. original balance, current balance, interest rate, term, etc.)
- Most recent credit card statements
- Income tax returns (past two years)
- Copies of legal documents (i.e. wills, trusts, prenuptial agreements, divorce decrees, etc.)
- Information on unique financial events or situations (i.e. major purchase, debt refinancing, expected inheritance, etc)
- If applicable, business financial statements and tax returns for last two years, articles of incorporation, buy/sell agreement, group benefit employee package, business insurance policies
- All pertinent information regarding assets owned by dependent children or parents, that will be used to meet goals
- All pertinent questions you would like answered