Checklist

Things to bring with you:

- ❑ Investment accounts
  Current statements showing value and positions (stocks, bonds, mutual funds, CDs, money markets, etc.)
- ❑ Bank accounts
  Current statements showing value and positions (CDs, money markets, etc.)
- ❑ A list of your other assets
  Homes, personal property, rental property, collectibles, etc.
- ❑ A list of your liabilities
  Debts, mortgages, loans, etc.
- ❑ Insurance policies
  Life, long-term care, etc.
- ❑ Social Security information
  Statements you may have received with an estimate of earnings at retirement.
- ❑ Current contributions
  401(k)s, IRAs, savings accounts, etc.
- ❑ All sources of income
  Salaries, pension plans, annuities, trust funds, rental income, etc.

Questions I will ask you:

- When do you and your spouse/partner want to retire?
- How much money will you need to live on at retirement?
- What are your goals?
  (travel, new cars, boat, vacation home, etc.)
- Do you anticipate any inheritances?

Leslie Evans Dunn
Managing Principal
2 Cardinal Park Drive, Suite 101B
Leesburg VA 20175
P 703-467-0370
F 703-467-0290
Leslie.Dunn@PolarisFS.com
www.PolarisFS.com

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