BARTON SPECTOR WEALTH STRATEGIES

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Items to Bring to Our Meeting

- ❑ Monthly budget.
- ❑ Balance sheet.
- ❑ Tax returns for the last two years.
- ❑ Estate planning documents including wills, powers of attorneys, living wills, deeds, trust documents, or legal agreements that are relevant.
- ❑ Investment portfolio statements from other brokerage firms, banks, or investment companies.
- ❑ Pension plan information or projections, current company retirement plan statements (401 (k), TSA, 403 (b), ESOP, Thrift Savings Plan).
- ❑ Insurance policies including health, life, disability, homeowner, automobile, umbrella, and long-term care.
- ❑ Business insurance policies, including buy-sell, disability overhead, key person insurance, executive bonus, etc.
- ❑ Annuity statements.
- ❑ Most recent statement from the Social Security Administration.
- ❑ Divorce decrees, prenuptial agreements.
- ❑ Charitable gifting programs established.
- ❑ Any information on unique financial situations which have occurred since our last conversation (i.e., major debts, company buyout offers, inheritances, etc.).
- ❑ Any other information you would like to discuss.