



Pennsylvania Financial Consultants

Building a state of independent wealth.

At our upcoming meeting, we will be discussing what is important to you, establishing financial goals and reviewing your current financial position. At the end of our meeting, I will be able to tell you specifically what I can do for you and how we can work together. At that time you will need to decide if you wish to hire me to work for you.

In order to do the best possible job for you, it is extremely important that you bring all of the applicable items on this list to our meeting.

Items Needed for Our Initial Meeting

Done	N/A		
_____	_____	1) INCOME:	Last year's tax return, personal and corporate. Your most recent paystub.
_____	_____	2) RETIREMENT:	Most recent plan statements such as for a company plan, 401(k), Keogh, Simplified Employee Pension (SEP), Individual Retirement Account (IRA), Tax Sheltered Annuity (TSA), or other annuities. Your most recent Social Security benefit estimate statement.
_____	_____	3) SAVINGS:	Most recent statements from bank accounts, money market funds, and certificates of deposit.
_____	_____	4) BROKERAGE ACCOUNTS AND STOCK OPTIONS:	Most recent statements detailing stocks (including both stocks you've purchased and options you have not yet exercised), bonds, and mutual funds.
_____	_____	5) INSURANCE:	Policies or statements for life, disability, health, auto, homeowners, renters, liability, long-term care, or any other insurance.
_____	_____	6) LOANS:	Loan information or statements for your primary residence, vacation and investment properties, cars, etc. Including origination date, amount borrowed, original length of loan, interest rate, and principal and interest payments.
_____	_____	7) BUSINESS OWNERSHIP:	Current plus the previous year's balance sheets and profit and loss statements as well as buyout agreements and a business valuation if you have one (include value of stock if publicly traded).
_____	_____	8) INHERITANCE:	A copy of the trust, will, or other documents detailing your inheritance (if available; if not, and the inheritance is verbal and certain, write the number on a piece of paper and include it).
_____	_____	9) ESTATE PLAN:	A copy of your own will, trust, or other document detailing what you wish to be done with your assets and liabilities when you die.

If you should have any questions whatsoever prior to our meeting, please feel free to contact me at 724-872-6311. Thank you.

Jack M. George, CFP®, CLTC, CMP™