wilon wealth management

INTRODUCTORY MEETING DOCUMENT CHECKLIST

Please make sure you have all of these documents collected prior to our introductory meeting.
If you need to reschedule, please contact our office.

ESTATE DOCUMENTS

- [ ] Wills
- [ ] Revocable & Irrevocable Trusts
- [ ] Power of Attorney
- [ ] Living Wills/Health Directives

BENEFITS

- [ ] Social Security Statements
- [ ] Veteran's Administration Info
- [ ] Employer Benefits
- [ ] Pay Stubs

INSURANCE POLICIES

- [ ] Life
- [ ] LTC
- [ ] Disability

BANK & INVESTMENT STATEMENTS

- [ ] Pensions, IRAs, Annuities, etc.
- [ ] Investment Accounts
- [ ] Stock Options/Certificates

LIABILITIES

- [ ] Mortgages
- [ ] Loans

TAXES

- [ ] Tax returns (all pages from the last two years)

NOTES FOR MEETING DISCUSSION:

www.wilonwm.com