Investment Strategists at Better Banks

Client Consultation Checklist

- ☐ Driver's License
- ☐ Most Recent Tax Return
- ☐ All Investment Statements
  (username/password for online accounts)
- ☐ Insurance Policies and Statements
  - ☐ Property & Casualty
  - ☐ Life Insurance
  - ☐ Long-Term Care
  - ☐ Medical Supplements
- ☐ Copy of Will/Trust/Power of Attorney
  (If Applicable)
- ☐ Social Security Report
  (register at www.ssa.gov)
- ☐ Social Security Numbers for Dependents
- ☐ 401k Statements, Pension Statements
  (username/passwords for online statements)
- ☐ Mortgage Statements
  (original policy and most recent statement)
- ☐ Completed Profile Questionnaire & Financial Worksheet

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