THE K CORPORATION

a financial strategies firm

What should I bring with me to my meeting?

If you are visiting us for the first time, it is a very good idea to bring copies of your company's benefits and handbook so that you may refer to them throughout the meeting. At a minimum, jot down some general details about your company's history and objectives and bring them with you. It is also a good idea to write down any questions or concerns that you may have so we can be sure to address them when we meet.

Meeting Checklist

Please use the checklist below to help you better prepare for your meeting with us.

Retirement Benefits

- ☐ 401(k)
- ☐ Pension Plans
- ☐ SEPs
- ☐ IRAs
- ☐ Roth accounts
- ☐ Other tax-deferred Retirement Accounts

Health Benefits

- ☐ Group Medical
- ☐ Group Dental

Insurance Benefits

- ☐ Group Long Term Care
- ☐ Group Disability (Short and Long)

Insurance Policies

- ☐ Disability Income (premiums and face amount)
- ☐ Life Insurance (premiums and face amount)
- ☐ Long Term Care
- ☐ Other

Ownership Structure

- ☐

Wills and Legal Documents

- ☐ Wills
- ☐ Trusts
- ☐ Succession Plans
- ☐ Other

IRS Documents

- ☐ Tax Returns
- ☐ Audit History

Business Documents

- ☐ Buy/Sells
- ☐ Partnership Agreements
- ☐ Key Person agreements and executive benefits
- ☐ Bonus Plans
- ☐ Deferred Comp Plans

Cash Flow Issues

- ☐

Other Special Circumstances or Objectives

- ☐