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 personal accounts and statements so that you may refer to them throughout the meeting. At a minimum, jot down some general details about your financial accounts/history 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.

Cash Accounts

- ☐ Savings/Checking (at least a general idea of the balances or average balance
- ☐ Money Market Accounts
- ☐ CD's

Retirement Accounts (How much are you contributing to these accounts?)

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

Other investments

- ☐ Brokerage accounts
- ☐ Stock accounts
- ☐ Mutual Fund and bond accounts
- ☐ Other
- ☐ Collectibles/Heirlooms
- ☐ Business interests
- ☐ Real Estate
- ☐ 529 Accounts/College savings accounts

Insurance Policies

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

Wills and Legal Documents

- ☐ Wills
- ☐ Trusts
- ☐ Other

IRS Documents

- ☐ Tax Returns
- ☐ Other

Special Circumstances

- ☐ SSI Statements
- ☐ SSDI Statements
- ☐ Medical History
- ☐ Other

Business Documents

- ☐ Buy/Sells
- ☐ Partnership Agreements