Appointment Checklist

New and existing clients may use this checklist as a reference to help prepare for the upcoming appointment. Please bring any of the items listed below to your appointment that you have not yet provided to Joe.

- ❒ Statements for all investment accounts, including Individual Retirement Accounts (IRAs) and mutual funds not already held at Raymond James
- ❒ Stock certificates and other financial information held at home
- ❒ Annuity contracts
- ❒ Insurance policy statements, including life, disability, and long-term care
- ❒ Company retirement plan statements (401k, 403b, 457 plans, etc.), and if applicable, your option statement
- ❒ Recent pay stub and pension benefit information
- ❒ Most recent Social Security retirement benefits estimate information (to access online, please visit www.ssa.gov/begin-est)
- ❒ Business/real estate information, including rental property income
- ❒ Most recent federal and state tax returns
- ❒ Trust documentation, if applicable

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