Documents to bring to your initial Planning meeting

Investment Statements/Information

- Mutual Funds
- Individual Equity & Bond Holdings
- Savings Accounts/CDs/Money Market Funds
- Checking Accounts
- Corporate Savings and Thrift Programs
- Vested Pension Program Accounts

Company Benefits Booklets/Employee Benefit Program Descriptions

- Group Health Insurance
- Group/Individual Disability Income Insurance
- Deferred Compensation Plans
- Pension and Profit-sharing Plans

Insurance and Annuity Contracts

- Life Insurance
- Qualified/Nonqualified Annuities
- Disability Income
- Long Term Care
- Property and Casualty Declaration Pages

Estate Planning

- Wills
- Living Wills and Trust Directives
- Revocable/Irrevocable Trusts
- General/Durable Power of Attorney
- Financial/Health Care Power of Attorney
- Family Limited Partnership

Income/Cash Flow

- Most Recent Paycheck Stubs
- Last Two Years Income Tax Returns

Artisan Capital Management - 129 W Saint Clair St, Romeo, MI, 48065 - 586-752-6511

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