REVIEW SERVICES, INC.
FINANCIAL COUNSELORS

HOMEWORK FOR DATA GATHERING MEETING

Please provide copies of the following prior to your next meeting:

- ☐ Retirement medical, prescription and life insurance information
- ☐ Social Security Benefit Information
    - ➢ Available at https://www.ssa.gov/myaccount/
- ☐ Pension Benefit Information (if applicable)
- ☐ Current Investment statements
    - ➢ *NOTE: Include full history on any taxable accounts and annuities*
- ☐ Income Tax Returns – Past 2 years Insurance & Annuity Policies
    - ➢ Life, Auto, Homeowner's and Umbrella policies
- ☐ Estate Documents
    - ➢ Will, Power of Attorney for Financial and Health Care, Living Will, Trust
- ☐ Current Beneficiary Designations
    - ➢ Life Insurance, annuities, retirement accounts (IRAs, 401(k), etc)

Please bring the following documents (completed) to our next meeting:

- ☐ Confidential Income and Assets Packet
    - ➢ *To identify your net worth*
- ☐ Monthly Budget Form
    - ➢ *To define your current and future income needs*
- ☐ Client Concerns Survey
    - ➢ *To coordinate all your financial objectives and concerns*
- ☐ Investment Policy Questionnaire
    - ➢ *To establish your investment objectives and risk level*

If you would like to send us any of the documents electronically, please click here to upload them to a secure site. You will be asked to enter your name and email address.