

Appointment Checklist

Please bring the following documents for your next appointment.



RETIREMENT PLANNING

- 401k Statements
- Monthly Budget
- IRA statements
- Pension Information
- Social Security Statement

WEALTH MANAGEMENT

- Tax Return
- Additional Investment Accounts
- College Savings Account
- Inventory of Property Owned

ASSET PROTECTION

- Life Insurance Policies
- Long Term Care Insurance Policies
- Outstanding Debt
- Annuities

ESTATE PLANNING

- Will
- Trust Documents
- Power of Attorney Documents

David Anderson – Financial Advisor – LNB Investment Services

1204 W. HWY 662 Newburgh, IN 47630

812-715-1007 - 812-604-2535 - David.Anderson@lnbinvestments.com www.lnbinvestments.com

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