

Client

Phone

Significant Other

Please return this form to me. Thanks!

Yes No

Do you have a current pension plan?.....

| | |
|--|--|
| | |
|--|--|

CURRENT BALANCE..... \$ _____

Do you have a current IRA?.....

| | |
|--|--|
| | |
|--|--|

CURRENT BALANCE..... \$ _____

Yes No

Would you like to rollover your pension plan or IRA

| | |
|--|--|
| | |
|--|--|

(Maybe you would like to combine your IRA's)

Please call me to discuss your rollover 301.253.0013

Yes No

Do you have a will?.....

| | |
|--|--|
| | |
|--|--|

If yes, when was it last updated?.....

| | |
|--|--|
| | |
|--|--|

Would you like to discuss the items below?

Yes No

| | | |
|--------------------------------|--|--|
| Retirement Planning?..... | | |
| College funding?..... | | |
| Life Insurance?..... | | |
| Disability Insurance?..... | | |
| Long-term care insurance?..... | | |