For Your Appointment

Please Bring:

1. Legal documents you may have (Will, power of attorney, living will, succession, etc.)
2. Trust established by you or for you
3. Income tax return for latest year available
4. Long-term care insurance policies, if any
5. List of assets (Balance Sheet if available):
   a. Home(s)
   b. Other Real Estate
   c. Car(s)
   d. Other Titled Property (trailer or mobile home)
   e. Business Interest
   f. Other
6. List of income: His Hers
   a. Social Security
   b. Pension
   c. Business
   d. Other
7. List and recent bank statements, investment and brokerage statements, IRA's, 401k, 403b, DROP, etc. statements, list of any other investments
8. List of CDs with their value, maturity date, and current rate (%)
9. Annuities (bring annuity and latest statement)
10. Life insurance policies (bring actual policy and latest statement)
11. If you or your spouse are Veterans, bring service separation papers (DD-214)
12. Most recent tax notices for properties which you own all or any part
13. List all gifts/transfers (money, property of any kind) made by applicant(s) or spouse within the last five years showing the item, the date of transfer, the value and to whom given.

Pennington Financial, LLC

1-866-323-4125 or 318-855-4690