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## **Pre-Appointment Checklist**

During our upcoming visit, we will gain a better understanding of your goals and what is important to you, as well as allowing you the opportunity to learn more about us and our team. Copies of the documents below are necessary for us to provide you with an accurate analysis of your financial picture and identify possible solutions that are in line with your goals. *Please understand that all conversation and documents provided are kept completely confidential.* 

## PLEASE BRING THE FOLLOWING ITEMS TO YOUR APPOINTMENT:

□ Investment / Retirement Statements (mutual funds, annuities, IRAs, brokerage accounts)

- Bank Accounts & CD Statements
- □ Social Security Statements
- □ Pension Statements
- □ Life Insurance and/or Long-Term Care Insurance Statements
- □ Most Recent Tax Return
- □ Personal Budget
- □ Other important documents / information you feel important

## NOTES

Securities offered through LPL Financial, Member FINRA/SIPC. Insurance products offered through LPL Financial or its licensed affiliates. The investment products sold through LPL Financial are not insured Shell Lake State Bank deposits and are not FDIC insured. These products are not obligations of Shell Lake State Bank and are not endorsed, recommended or guaranteed by Shell Lake State Bank or any government agency. The value of the investment may fluctuate, the return on the investment is not guaranteed, and loss of principal is possible.