Ford Financial Group
Helping Chart Your Financial Course

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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

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