



**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

NOTES

219 River St
Spooner, WI 54801
P: (715) 635-3136
F: (715) 635-6841

2820 E 2nd St, Suite 1
Superior, WI 54880
P: (715) 395-3155
F: (715) 395-3170

821 N Bridge St
Chippewa Falls, WI 54729
P: (877) 695-3391
F: (715) 395-3170

401 W 5th Ave
Minong, WI 54859
P: (715) 466-1045
F: (715) 635-6841

15818 Railroad St
Hayward, WI 54843
P: (715) 934-3136
F: (715) 635-6841

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