

STIFEL

Packing House
Wealth Management

Mary Carruthers, CFP®
Senior Vice President/Investments

Robert Heinze, CFP®, AIF®, AIFA®
Managing Director/Investments
Branch Manager

(909) 307-8478

31 W. Stuart Avenue, Suite 200
Redlands, California 92374

Initial Meeting Checklist:

Please bring the following items to your first meeting.

If you are currently working:

- ☐ Most recent tax return
- ☐ Current investment statements
- ☐ Retirement plan statements from prior employers
- ☐ Current employer retirement plan statement
- ☐ Pension plans and income projections
- ☐ In-force insurance policies (including long-term care) and annuity contracts (most recent statements)
- ☐ Trust documents/Power of Attorney
- ☐ Debt Information: balances and interest rates
- ☐ Social Security estimated benefits report
- ☐ Percentage or amount you are contributing to your employer retirement plan $/%_____
  Percentage your employer is matching $/%_____
- ☐ Annual income $_____
- ☐ Monthly net/take-home income $_____
- ☐ Monthly mortgage/rent $_____
- ☐ Monthly expenses less mortgage/rent $_____

(Please be sure to include all living expenses and miscellaneous expenses)

- ☐ Annual/irregular expenses $_____

(Please be sure to include all taxes, vacations, and insurance)

- ☐ Estimated target income for retirement (in today's dollars) $_____
- ☐ CPA/Tax Preparer: _____

If you are currently retired:

- ☐ Most recent tax return
- ☐ Current investment statements
- ☐ Retirement plan statements from previous employers
- ☐ In-force insurance policies (Including long-term care) and annuity contracts (most recent statements)
- ☐ Trust documents/Power of Attoney
- ☐ Debt information: balances and interest rates
- ☐ Social Security benefit amount $_____
- ☐ Total monthly income $_____
- ☐ Monthly mortgage/rent $_____
- ☐ Monthly budget $_____

(Please be sure to include all living expenses and miscellaneous expenses)

- ☐ Annual/irregular expenses $_____

(Please be sure to include all taxes, vacations, and insurance)

- ☐ CPA/Tax Preparer: _____
- ☐ Attorney: _____
- ☐ Insurance Agent: _____