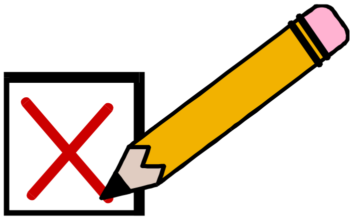

Financial Planning Checklist

In order for us to give you the most accurate financial plan we will need for you to provide us with the following information:

- Last Year's Tax Return (first 2 pages)
- Brokerage/Investment Account Statements
- Social Security Statements
- Bank Account Information (checking, savings, CD's, money market)
- Life Insurance Policies & Statements, including benefits through your employer
- Long-term care and/or disability insurance policies.
- Wills and/or Trust Documents
- Real Estate Holdings
- Annuity Statements
- Health Insurance Information
- 529 Statements and/or other assets for the children
- IRA, Retirement Account and Pension Statements
- Debt Information (mortgages, credit cards, auto loans, lines of credit)
- Accountant and Attorney information
- Any other items you feel would be helpful.

PLANNINGTEAM
FINANCIAL ADVISORS