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ING FINANCIAL PARTNERS

Sam Head
David Monckton, CFP®
Wesley Frierson

Investment Advisor Representatives

We are delighted to meet with you personally to explore all aspects of your current financial situation. In order to make sure everything is efficiently positioned and consistent with your goals, please consult the list below on what to bring to your appointment. While there is no prerequisite, these items will allow us to give you a more thorough evaluation. Items we can evaluate include:

1. Taxes - Your most recent two years of tax returns.
2. Investments - Copies of all financial statements (including any retirement plans).
3. Interest Rates - A listing of all bank accounts with values and current interest rates.
4. Estate Plan - Current wills, trusts and durable powers of attorney along with health care directives.
5. Risk Management - Any insurance policies.
6. Mortgage and Other Debt - Balance owed, interest rate, monthly payment, and payoff date.
7. Income - Salary, wages, social security and pension (current or projected).
8. Income needs - The amount of money you desire to live on each month
9. Any other financial document you deem necessary for a thorough evaluation.

We value the time invested on your part and it is our commitment to make sure this is a good investment of your time. Please feel free to call our office if you have any questions.