PRICE PERKINS

Initial Consultation Checklist:

- ✓ Household expense and Income Summary

- ✓ All Investment Statements (as applicable)
  - o Savings Instruments (CD's, Money Market, etc)
  - o Individual/ Joint Brokerage Account(s)
  - o IRA
  - o Employer Plans
  - o Social Security Statements

- ✓ All Insurance Policies and Statements
  - o Long-Term Care
  - o Life Insurance

- ✓ Copy of Trust (If Applicable)
  - o Real Estate (Appraised value, loan amount, & cash flow)

- ✓ Pensions
  - o Amounts
  - o Benefit options

- ✓ Debt
  - o Terms (Interest rate, time frame, note, payment)

PRICE PERKINS, LLC
10146 W. BROAD STREET, SUITE B
GLEN ALLEN, VA 23060
804.592.2375
www.priceperkins.com