FINANCIAL CHECKLIST

Bring this information to our initial meeting, if possible

Bank and Credit Union Accounts

Current statement for all accounts

Life Insurance

Statement showing company name, death benefit amount, policy #, and owner

Long Term Care Insurance

Statement showing company name, owner, and terms of coverage

Retirement Funds

Statement showing company name, current value, account number, and owner

Investments

Statement showing company name, current value, account number, and owner
Original company stock certificates

Real Estate

Most recent tax bill
Deed

Bonds

Original bonds

Business Interests

Partnership agreement
Corporate Book

If you have any questions, please contact Legacy Law Group, LLC at:

Tel: (920) 560-4651 or
Email: info@legacylawllc.com