J.Nelson
Financial Group, LLC

ITEMS REQUIRED FOR CONSULTATION

INVESTMENT STATEMENTS

- ☐ Retirement Plan Statements (401k, 403b, 457)
- ☐ IRA Statements (Traditional, Roth, Simple, SEP)
- ☐ Brokerage Statements
- ☐ Annuity Statements
- ☐ Life Insurance Statements
- ☐ Option Statements

SOCIAL SECURITY/PENSION DOCUMENTS

- ☐ Pension Benefits from Employer’s Defined Benefit Plan
- ☐ Pension Benefits from State or Local Government (STRS, PERS)
- ☐ Social Security Statements

TAX DOCUMENTS

- ☐ Your Most Recent Tax Return

ESTATE PLANNING DOCUMENTS

- ☐ Latest Will and Testament
- ☐ Trust Documents (Revocable, Irrevocable, ILIT, etc.)
- ☐ Powers of Attorney
- ☐ Health Care Powers of Attorney
- ☐ Living Will

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