

WFS considers all aspects of your financial life to assemble a customized, accurate financial plan to meet your specific goals. Below is a checklist of all of the necessary paperwork to bring to your complimentary, no obligation consultation with your WFS Representative.

- Credit Union/Bank Accounts:  
Checking, Savings, CD, Money Market
- Brokerage Accounts  
529 Plans, UTMA, Custodial Accounts
- Retirement Accounts:  
401(k), 403(b), 457, IRAs, Roth, Pension Plan, etc.
- Annuity Statements
- Company Benefits:  
Stock options, restricted stock, Bonuses, Profit Sharing, etc.
- Mortgage, Equity Line, Credit Cards, Auto Loans
- Social Security Benefits Statement
- Insurance Policy Information (home, auto, life)
- Family Trust Information
- Previous Year's Tax Return
- Additional Asset, Liability Information
- Other: \_\_\_\_\_