

Client

Phone

Significant Other

Please return this form to me. Thanks!

Yes No

Do you have a current pension plan?.....

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CURRENT BALANCE..... \$ _____

Do you have a current IRA?.....

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CURRENT BALANCE..... \$ _____

Yes No

Would you like to rollover your pension plan or IRA

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(Maybe you would like to combine your IRA's)

Please call me to discuss your rollover 301.253.0013

Yes No

Do you have a will?.....

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If yes, when was it last updated?.....

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Would you like to discuss the items below?

Yes No

Retirement Planning?.....		
College funding?.....		
Life Insurance?.....		
Disability Insurance?.....		
Long-term care insurance?.....		