

Name (First, MI, Last) _____ DOB _____

Phone (home) _____ (cell) _____

Email _____

Name (First, MI, Last) _____ DOB _____

Phone (home) _____ (cell) _____

Email _____

Best business day/time for phone calls _____

Best business day/time for meetup _____

What are your biggest financial concerns? _____

Primary questions for Adam? _____

In order to gain insight into your financial situation, please provide us with complete sets of the following applicable documents:

- ◆ Company plan statements (i.e. 401k, 403b, 457, etc.)
- ◆ All other investment account statements
- ◆ Previous 2 years' complete personal and, if applicable, business tax returns
- ◆ Pension plans
- ◆ Detailed student loan printout from loan servicer provider (Navient, NelNet, etc.)
- ◆ Current practice balance sheet
- ◆ YTD income (Profit/Loss) statement (or previous year if <6 months into fiscal year)
- ◆ YTD statement of cash flow (or previous year if <6 months into fiscal year)

If you are unable to provide the above mentioned documents prior to your call or at the time of your in-person meeting, please email clients@integratedpwm.com or call 317 706-4748.