Insurance and Financial Review Meeting Checklist

COUNTRY
FINANCIAL

Please gather and bring the following documents with you when you meet with your COUNTRY representative. We understand that not all of them may be applicable to you or that you may not have copies of everything, so bring as much as you can.

Not all of these items may be discussed in the first meeting; however, understanding your current financial situation and assets helps determine appropriate insurance coverage limits and recommendations to protect you and your family's future.

Insurance Documents

- [ ] Auto Insurance
- [ ] Home Insurance
- [ ] Personal Umbrella Insurance
- [ ] Special Property Policies (e.g. jewelry, guns, furs, high valued items)
- [ ] Commercial Policies (if business owner)
- [ ] Life Insurance policies

Bank and Investment Account Information

- [ ] Bank account statement
- [ ] Investment Accounts
- [ ] C.D.s
- [ ] Mutual Funds

Retirement Savings Programs

- [ ] IRAs
- [ ] SEP/Simple
- [ ] 401(k) Information
- [ ] Keogh (HR-10)
- [ ] 403(b)

Additional Sources of Income

- [ ] Other Employer-Sponsored Retirement Plan or Pension
- [ ] Rental Income
- [ ] Social Security Benefit Statement
- [ ] Annuities

Other Information

- [ ] Latest Federal Tax Return
- [ ] Latest State Tax Return
- [ ] Existing Will

L29-486-00 (12/07)