PLANNING SERVICES CHECKLIST

No matter where you're starting from, you'll always begin with your COUNTRY Financial® representative

You may not discuss all the topics below at your initial meeting, but understanding your current financial situation helps us consider alternatives to help you protect and build for your family's future. Please bring as much information as you can. Below is a list of example documents to help you get started:

Insurance Documents

- ☐ Auto & Home
- ☐ Disability income
- ☐ Life insurance
- ☐ Annuities

Saving and Investment Account Information

- ☐ Bank account statements
- ☐ CDs
- ☐ Investment account statements
- ☐ Mutual fund statements
- ☐ Retirement account statements

Sources of Income

- ☐ Salary information
- ☐ Pension details
- ☐ Rental income
- ☐ Social Security benefit statement

Please bring additional documents you feel may be helpful.

If you have any questions, please don't hesitate to call your financial representative or visit **countryfinancial.com/plan**