MANSKE WEALTH MANAGEMENT

Document Checklist

Please be sure to use this checklist and gather all applicable items. Many of our clients have greatly benefited from having these documents to assist our discussion, as it ranges from general ideas to their specific questions and situations.

Bring With You:

☐ Current federal and state tax return

☐ Most recent bank account statements

☐ Most recent employee benefit statement

☐ Most recent mortgage statements

☐ Most recent auto/home insurance policies

☐ Most recent mutual fund statements

☐ Any current Certificate of Deposits

☐ All life/disability insurance policies

☐ Trust and Will documents

☐ All IRA or pension account statements

☐ Most recent brokerage account statements

☐ All annuity contracts and policies

☐ Any unit investment trust statements

☐ List of all common stocks personally held

☐ List of all municipal bonds personally held

☐ List of all U.S. Treasuries personally held

Possible Questions:

☐ Retirement planning, IRA's/Roth IRAs, 401(K)s

☐ Controlled & restricted stock sales & lending

☐ Employee Stock Option Plans (ESOP)

☐ Estate planning services

☐ How rebalancing increases return

☐ How dollar cost averaging lowers risk

☐ Lowering the cost of your current loans

☐ Trust services

☐ Business insurance, succession planning

☐ College planning services

☐ Long-term health care, insurance needs

☐ Equities, preferred stock

☐ Corporate bonds, tax-free bonds

☐ Tax-deferred annuities

☐ Mortgages and credit management

☐ Home equity credit lines

☐ U.S. Treasuries

1010 North San Jacinto, Suite 200
Houston, Texas 77002

admin@manskewealth.com
www.manskewealth.com

Ph: 713-581-1994
Fax: 713-481-5564