



## **Checklist for Initial Consultation** *current statements required*

- All Employer-sponsored Investment Plans** (present and former employers)
- All IRAs**
- All Taxable investment accounts** (joint and individual)
- Current cash positions** (bank, CDs, Money Markets)
- Any individual stocks or bonds**
- Estimated worth of any investment property**
- Any education-related investments** (529 plans, Coverdells, etc.)
- List of all outstanding debt and amounts/terms.**
- List of all life insurance policies** (type of plan, pay out).

**We look forward to helping you achieve your financial goals and thank you for considering ATI for your investment needs.**