# It’s Time to Review Your Financial Strategy.

GATEWAY FINANCIAL PARTNERS

- ☐ Non-LPL Financial statements for all investment accounts, including Individual Retirement Accounts (IRAs) and mutual funds
- ☐ Company retirement plan statements and, if applicable, your option statements
- ☐ Bank and certificate of deposit (CD) statements, including maturity dates and interest rates
- ☐ Annuity contracts
- ☐ Home equity and mortgage information, including interest rate, monthly payment of principal and interest only, and current market value of home
- ☐ Other debt payments, interest rates and current amounts due
- ☐ Last year’s federal and state tax returns
- ☐ Insurance policy statements, including life, disability and long-term care
- ☐ Business/real estate information, including rental property income
- ☐ Recent pay stub, pension statements and Social Security check, if applicable
- ☐ Most recent Social Security retirement benefits estimate information, if applicable (To access your retirement benefits estimate information online, visit www.socialsecurity.gov/begin-est)
- ☐ Your Social Security number and date of birth
- ☐ Social Security numbers and dates of birth for all your account beneficiaries
- ☐ Stock certificates, savings bonds and other financial information held at home

**Contact Me:**

LPL Financial Advisor