



Apogee Wealth Advisors
477 Madison Ave, 6th Floor
New York, NY 10022

CHECKLIST

Please bring to your first appointment:

- Drivers License/Passport copy
- Two Recent Paystubs
- Tax returns (last 2 years)
- Legal documents (will, living will, health care proxy, power of attorney, trusts)
- Stock options and grants documentation
- Deeds to property owned and related mortgage statement
- Policy summary pages for insurance (life, disability, long-term care) and beneficiary designations
- Policy declarations pages for Property & Casualty insurance policies (auto, home, umbrella, personal articles)
- Social Security benefits statement
- Bank/Investment/Retirement/Annuity account statements
- Children's accounts statements (UGMA, UTMA, 529)
- Summary of employer provided group benefits, including summary plan description:
 - Group life/Group Disability/401k/Profit Sharing/Pension Plan/Deferred Comp