

Your LOGO HERE

Thank you for joining us today!

It's been our pleasure to have you with us, and we look forward to sitting down with you soon to better understand your unique goals and objectives.

Your upcoming visit is scheduled for

At this time

A.M. / P.M.

Our Office

Address HERE



So that we can best serve you at this appointment,
please bring the following items* with you:

- Most recent IRA and retirement statements
- All life insurance and annuity policies and/or current statements
- Copies of will and trust (*if applicable*)
- Copy of any power of attorney documents
- Two years of income tax returns
- List of stock/bond certificates

If you have any trouble locating these items before your visit, simply give us a call to let us know. In addition, if you have ANY questions before your no-obligation appointment, we're just a phone call away! Please call us at 555-555-5555.