



## THE DRISCOLL GROUP, INC.

An Independent Registered Investment Advisor  
FINANCIAL CONSULTANTS

### Things To Bring To Your Appointment

#### List of Assets:

- Brokerage Statements
- Bank Statements
- list of bonds, CD's
- Savings Account Statements
- IRA Statements/information
- Pension/Profit Sharing Plan info/Documentation

#### List of Liabilities: (Who Is Owed/How Much/Interest Rate/Term Remaining)

- Mortgages (1st, 2nd, Home Equity, etc.)
- Bank Loans
- Car Loans
- Student Loans
- Credit Cards

#### Tax Returns From the Last Two Years

#### Description of Employee Benefits (2, if both spouses work)

#### List of Living Expenses (This can be obtained by going through one's checkbook and credit card statements for the last 12 months)

#### 2 Most Recent Paycheck Stubs (4, if both spouses work)

#### Insurance Policies:

- Automobile
- Homeowners
- Umbrella Liability
- Life
- Disability

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