ATLAS INVESTMENT MANAGEMENT of NEST CAPITAL

Financial Advisor Meeting Checklist

DOCUMENTS TO CONSIDER BRINGING ALONG

To help prepare for your meeting, we've created a checklist of documents to consider bringing with you. Skip over ones that don't apply to your situation. If in doubt over a particular item, bring it along, and we'll help you sort it out.

- Drivers License
- Investment account statements
- Retirement account statements including 401(k) and 403(b) accounts
- Pension estimates
- Annuity statements
- Life/Long-term Care/Disability insurance policy information
- Home values and information on any real estate holdings
- Mortgage information
- Student loan statements
- Value/appraisal of significant personal property like boats and vehicles
- Business valuations (if you own your own business)
- Stock option plans
- Social security statements
- Information for beneficiary updates or changes: Beneficiary's full name, address, phone number and date of birth.
- Most recent tax return/tax documents

Bonus:

Consider these two items prior to the meeting with an advisor. Writing out and sharing your thoughts would be helpful.

- How would you describe your risk tolerance as it relates to investing?
- What do you want to achieve with your financial assets?

Greensboro: 743-230-2232 **Wilmington:** 910-834-6310 **Website:** atlasinvestmentmanagement.com