

Personal Consultation Checklist

What to Bring:

Please bring the following documents to your consultation:

- ☐ Current and former employer retirement account statements
- ☐ Current employer retirement account benefits
- ☐ IRA, mutual funds, and other investment account statements
- ☐ Social Security annual statements, if applicable
- ☐ Insurance policies statements (e.g., life, disability, long term care, home and auto)
- ☐ Pay statement
- ☐ Tax return
- ☐ Estate planning documents (e.g., will, trust)
- ☐ Any other relevant documents (e.g., budget exercise, asset allocation questionnaire)
- ☐ Mortgage statements and other debt information (e.g., auto, student loan, home equity, credit card)

Your consultation is scheduled with:

Name

Phone

Email

Date

Time

Location

MetLife administers the Retirewise program, but has arranged for specially-trained third party financial professionals to offer financial education and, upon request, provide personal guidance to employees and former employees of companies providing Retirewise through MetLife.

Any discussion of taxes herein or related to this document is for general information purposes only and does not purport to be complete or cover every situation.