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

Metropolitan Life Insurance Company, New York, NY 10166.
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