Initial Meeting Document Checklist

As professionals in Wealth Management, we ask that you review the document checklist of items that we will need you to bring to the first meeting to better assist us in the first review of your financial situation.

- ❑ Personal Planning Questionnaire (PPQ) completed
  - The PPQ will ask detailed questions on current assets, income, expenditures, retirement income, social security and pension information, etc.
- ❑ Account information
  - Statements for checking, savings, CD's and brokerage accounts, etc.
- ❑ Retirement income
  - Statements for 401(k), 403(b), 457, pension benefit projections, IRA/Roth, social security (www.SSA.gov to print estimate statement), etc.
- ❑ Previous year tax returns with supporting documents
  - Personal and corporate, etc.
- ❑ Insurance policies
  - Personal, business and group benefits, etc.
- ❑ A list of questions that you may have

The mission of Valicenti Advisory Services, Inc., is to provide specialized investment, tax and business services for our clients in order to meet their personal financial goals.

CELEBRATING 35 YEARS

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Asset management as individual as you

An on-line publication by The Investment Committee