WHAT TO BRING TO YOUR MEETINGS WITH PIVOT INCOME STRATEGIES

1. **Statements** for each investment you own, where applicable:
   - 401K, IRA's, 403b, SEP/SIMPLE
   - Investment or Stock Accounts
   - College Education Plans: 529/Coverdel

2. **Income Tax Return(s)** for last year

3. **All Insurance Policies** (please include declarations of coverage)
   - Life Insurance Policies (for all members of your family)
   - Disability Income Insurance Policy
   - Long Term Care Insurance Policy
   - Any other types of Insurance Policies

4. **Company Provided Group Benefits** for you and your significant other (please include a print out of specific coverage and costs if available)

5. **Will and Trust Documents**

6. **Business Plan & Documents**
   - Articles of Incorporation
   - Operating Agreements
   - P&L
   - Balance Sheet

7. A filled-out copy of **Either the Short or Long-Form** provided on the website

- Long-Form: for Large Business ($10Mil+), Estate and Legacy Planning
- Short-Form: for Businesses under $10Mil, Retirement, Individual and Family Planning

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