



## 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

Rebecca Gorrell is an Agent with New York Life Ins. Co. & a Registered Representative offering securities through NYLIFE Securities LLC, member FINRA/SIPC, A Licensed Insurance Agency, 7500 College Blvd, Ste 860-861, Overland Park, KS 66210. PIVOT Income Strategies, LLC is not owned or operated by NYLIFE Securities LLC or any affiliates. Neither PIVOT Income Strategies, LLC and its employees, nor NYLIFE Securities LLC or its representatives or affiliates provide tax, legal or accounting advice. Please consult your own tax, legal, or accounting professional before making any decisions.

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

**PIVOT Income Strategies**

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