



MY HOMEWORK

		Name	Date
Spouse 1	Spouse 2		
<input type="checkbox"/>	<input type="checkbox"/>	Tax Return Year _____	
<input type="checkbox"/>	<input type="checkbox"/>	Business Tax Return Year _____	
<input type="checkbox"/>	<input type="checkbox"/>	Social Security Statement	
<input type="checkbox"/>	<input type="checkbox"/>	Life Insurance Statement	
<input type="checkbox"/>	<input type="checkbox"/>	Long-Term Care Statement	
<input type="checkbox"/>	<input type="checkbox"/>	Will/Trust _____	
<input type="checkbox"/>	<input type="checkbox"/>	Full Financial Statement _____	
<input type="checkbox"/>	<input type="checkbox"/>	Full Financial Statement _____	
<input type="checkbox"/>	<input type="checkbox"/>	Full Financial Statement _____	
<input type="checkbox"/>	<input type="checkbox"/>	Full Financial Statement _____	
<input type="checkbox"/>	<input type="checkbox"/>	Full Financial Statement _____	
<input type="checkbox"/>	<input type="checkbox"/>	Full Financial Statement _____	
<input type="checkbox"/>	<input type="checkbox"/>	Other _____	
<input type="checkbox"/>	<input type="checkbox"/>	Budget Worksheet (attached)	

NEXT APPOINTMENT

Date _____

Time _____

For help with documents

[Company Phone]

[Company Email]

[Company Address]

Return Homework to [Company Name] by _____

Drop off at office Fax to office - [Company Fax Number]



[Investment Advisory Disclosure and/or BD Disclosure]

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