



## PROGRESS MEETING CHECKLIST

Please bring the following items to your Progress Meeting -

- **Listing of any *changes* to your Assets and Liabilities since our last Meeting**
- **Recent employee pay stub**
- **Most recent statement of the following accounts (only for accounts that Kaizerman & Associates does not receive a statement directly from the provider)**
  - Money Market, Savings and Certificate of Deposit Statements
  - IRA Account Statements
  - Brokerage/Mutual Fund Statements
- **Information on any *new or refinanced* Loans since our last Meeting**
  - Auto Loan
  - Credit Card Debt
  - Home Mortgages (First, Second and Line of Credit)
- **Federal and State Income Tax Returns (only required if tax returns were not prepared by Kaizerman & Associates)**
- **Information on *changes* to Estate Planning Documents since our last Meeting**
  - Wills and Trusts
  - Powers of Attorney
  - Health Care Proxy
- **Information on *changes* to Insurance Coverage since our last Meeting**
  - Homeowners, Automobile and Umbrella Liability Insurance
  - Life Insurance
  - Disability Insurance
  - Long Term Care Insurance
- **Other Employment Related Benefits**
  - Most recent retirement plan statements (401K, 403B, etc)
  - Current Stock Option Schedule
  - Information on *changes* to any Employee Benefits Programs