Document List for First Meeting

CHESAPEAKE FINANCIAL ADVISORS

The following list of documents may be discussed during our first meeting and used in preparation of your financial plan. Please have them handy or bring them to the first meeting.

	Document	Notes:
____	**Personal Finance Questionnaire**	____
____	**Brokerage statements -- Plus cost of securities**	____
____	**Trust account statements**	____
____	**IRA statements (Roth and Traditional)**	____
____	**Bank statements**	____
____	**401(k) statements**	____
____	**Pension statements**	____
____	**Social Security statement (annual "green" statement)**	____
____	**Salary information**	____
____	**Recent pay stub (if applicable)**	____
____	**Monthly expenses**	____
____	**Short & Long term goals / plans**	____
____	**2 years tax returns federal and state**	____
____	**Mortgage statements or other loan documents**	____
____	**Insurance policies**	____
____	**Employee benefits booklet**	____

Please bring with you or fax or email the documents to us at 410-823-5443 or ttaylor@PeakeAdvisors.com

List of Current Advisors

1 = very satisfied

CPA or Accountant — **Satisfaction rating:** 1 2 3 4 5

Name ____

Address ____

____

Phone ____

Attorney — **Satisfaction rating:** 1 2 3 4 5

Name ____

Address ____

____

Phone ____

Life Insurance Agent — **Satisfaction rating:** 1 2 3 4 5

Name ____

Address ____

____

Phone ____

Property & Casualty Insurance Agent (homeowners ins) — **Satisfaction rating:** 1 2 3 4 5

Name ____

Address ____

____

Phone ____

Financial Advisor — **Satisfaction rating:** 1 2 3 4 5

Name ____

Address ____

____

Phone ____