Delivery Meeting Checklist

Please bring the following documents with you so we may assist you in setting up your Generational Vault.

STATEMENTS

- [ ] Bank statements from all financial institutions
  - [ ] Checking
  - [ ] Savings
- [ ] Statement on any debts owed
- [ ] Investment statements held with other financial institutions and website logins
  - [ ] Annuities
  - [ ] Mutual funds
- [ ] Brokerage statements
- [ ] Pension plan statements

POLICIES

- [ ] Life insurance policies
- [ ] Long term care insurance policies

DOCUMENTS

- [ ] Estate plan documents
- [ ] Wills
- [ ] Trusts
- [ ] Powers of attorney
  - [ ] Health
  - [ ] Finance
- [ ] Tax returns
- [ ] Any other documents of importance to you

CONTACT INFORMATION

- [ ] Beneficiary contact information
- [ ] Alternate contact information - a person we can contact in case we are not able to get a hold of you due to a change in your contact information
- [ ] Authorized user contact information (if applicable) - a person(s) you authorize to have access your account or contact us with questions about your account

Retirement Has Its Challenges, We're Here to Help You Find a Solution.

1818 Grand Avenue, Wausau, WI 54403 | 715.355.4445
3621 E Hamilton Avenue, Eau Claire, WI 54701 | 715.318.4540
TF 800.236.3840 | F 715.355.4445 | Info@RetireWithBuska.com | RetireWithBuska.com

BUSKA Retirement Solutions, Inc.
BUSKA Wealth Management, LLC
A Registered Investment Advisory Firm