KROPOG Financial Group, LLC
Wealth Management ◆ Investment Services

# DOCUMENTS NEEDED

**IN ORDER TO ESTABLISH AN EFFICIENT FINANCIAL PLAN, IT IS NECESSARY THAT CERTAIN FINANCIAL DOCUMENTS ARE DISCUSSED AND ACCOUNTED FOR. THEREFORE, PLEASE GATHER COPIES OF ANY OR ALL OF THE FOLLOWING DOCUMENTS THAT YOU FEEL PERTAIN TO YOU AND YOUR FINANCIAL SITUATION:**

______ **LATEST STATEMENTS FOR ALL INVESTMENT AND RETIREMENT ACCOUNTS**

______ **SOCIAL SECURITY BENEFIT STATEMENT**

______ **WILLS, LIVING WILLS, MEDICAL POWERS OF ATTORNEY, TRUSTS, ETC. (IF ANY)**

______ **NAMES AND CONTACT INFORMATION OF OTHER ADVISORS (CPA, ATTORNEY, ETC.)**

______ **LIFE, DISABILITY, AND LONG-TERM CARE INSURANCE POLICY STATEMENTS (IF ANY)**

______ **MORTGAGE STATEMENT(S) (IF ANY)**

**IN ADDITION, WE ASK THAT YOU COMPLETE THE FOLLOWING WORKSHEETS PRIOR TO YOUR MEETING.**

______ **NET WORTH WORKSHEET (see attached)**

______ **CASH FLOW (BUDGET) WORKSHEET (see attached)**

**KROPOG FINANCIAL GROUP, LLC**

**(985) 727-6724**
WWW.KROPOGFINANCIAL.COM
2895 HWY. 190, ST. 205, MANDEVILLE, LA 70471