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Licensed to Represent Taxpayers Before the IRS

Member: Illinois Society of Enrolled Agents
National Association of Enrolled Agents

Recommended Documents For Initial Financial Meeting

- Bank Statements
- Mortgage Information
- List of Assets
- List of Liabilities
- Wills, Trusts, Healthcare Powers of Attorney
- Investment/Retirement Account Statements
- Social Security Statements
- Life, Disability or Long-Term Care Insurance Policies
- Tax Return
- List of Employee Benefits
- Health Insurance Information

Revised 5/21/19

REGISTERED REPRESENTATIVE
» Cetera Financial Specialists LLC

INVESTMENT ADVISER REPRESENTATIVE
» Cetera Investment Advisers LLC

Securities offered through Cetera Financial Specialists LLC, member FINRA/SIPC. Advisory services offered through Cetera Investment Advisers LLC. Cetera entities are under separate ownership from any other entity.