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DOCUMENTS TO BE FURNISHED BY CLIENT

Please bring any of the following documents that apply to you to your initial interview:

1. Deed(s) showing legal description to your home and/or other real property owned by you or your spouse;

2. Recent statement or cover sheet from bank(s), savings and loans and savings certificates held by you and or your spouse;

3. Corporate stock certificates and/or bonds;

4. Recent statement(s) from investment broker(s);

5. Copy of any pension or retirement programs, or employment related investment programs in which you or your spouse may be involved;

6. Life insurance policies with statements of loans against same;

7. Partnership agreements for any partnerships in which you or your spouse may be involved;

8. Corporate documents, by-laws, etc., for any corporation in which you or your spouse may be involved as an officer;

9. Copy of current trust, will(s), durable powers of attorney, living will(s);

10. Copy of any Marital property or Pre-Nuptial agreements signed by you and your spouse;

11. Copy of any other relevant agreements or any other information that will help establish your net worth, your spouse's net worth, your joint net worth, your income, and your spouse's income.

All of your documents will be returned to you at the conclusion of your initial interview.