



Craig Prudhomme
Financial Advisor
craigp@agatefins.com
20 Hartman Drive
Moose Lake, MN 55767
Phone: (218) 485-5725
MyRepChat Text: (218) 274-8080
www.agatefins.com

PLEASE BRING THE ITEMS INDICATED TO YOUR NEXT APPOINTMENT

Date: _____ Time: _____

All statements should be the most recent month, quarter, or current year where possible.

- Current driver's license or photo ID
- Current income and income sources (i.e., paystubs, monthly statements, etc.)
- Most recent social security benefit statements (generally comes 3 months prior to each birthday; or go to www.ssa.gov – My Social Security – Create an account to get your most up-to-date statement of benefits)
- Statements showing current investments and values of your stocks, bonds, savings bonds, mutual funds, annuity(s), brokerage accounts and other securities (with cost basis)
- Primary residence information (i.e., property market/tax value with cost basis, mortgage/home equity statements)
- Non-primary residence and/or other real property(s) owned (i.e., market/tax value with cost basis, outstanding balance, loan rate and maturity date)
- Outstanding loan statements with interest rates and terms – (i.e., auto, credit card, student loan, etc.)
- Inventory of business assets or fair market value of business enterprises (with cost basis and debt information)
- Bank/Credit Union accounts (i.e., checking, savings, certificates of deposit, etc.)
- Most recent tax returns for the past two years including supporting documents (i.e., W2s, 1099s, property taxes, etc.)
- Legal documents – (i.e., wills, trusts, powers of attorney, estate plan, healthcare directives, marital/divorce documents, etc.)
- Insurance policies with most recent statements or Declaration page – (i.e., life, long/short term care, long/short term disability, health, auto, homeowners, umbrella, etc.)
- Pension information from current and/or previous employers – (i.e., current value, monthly benefit, beginning age, survivorship/beneficiaries and inflation adjustments)
- Other goals (i.e., start a business, college, other) _____

Securities and advisory services are offered through LPL Financial (LPL), a registered investment advisor and broker-dealer (member FINRA/SIPC). Insurance products are offered through LPL or its licensed affiliates. First National Bank of Moose Lake and Agate Financial Services **are not** registered as a broker-dealer or investment advisor. Registered representatives of LPL offer products and services using Agate Financial Services, and may also be employees of First National Bank of Moose Lake. These products and services are being offered through LPL or its affiliates, which are separate entities from, and not affiliates of, First National Bank of Moose Lake or Agate Financial Services. Securities and insurance offered through LPL or its affiliates are:

Not Insured by FDIC or Any Other Government Agency	Not Bank Guaranteed	Not Bank Deposits or Obligations	May Lose Value
--	---------------------	----------------------------------	----------------