



Tax & CD
Financial, LLC
480.354.1040
1810 S. Crismon Rd., Ste. 188
Mesa, Arizona 85209

My Estate Planning Appointment

What do I need to bring?

- Completed "Getting Started" Questionnaire
- Investment assets (bank accounts, investment statement, life insurance policies, etc.)
- All deeds to real property (home, land, vacation)
- Statements for: bank accounts, brokerage accounts, stock certificates, bond certificates, annuity contracts, life insurance policies, IRA's, 401 K, etc.
- Checkbook