



*Helping Our Clients Achieve Financial
Independence for Over 45 Years*

Financial Planners:
PATRICK J. SGROI
JOHN G. CLOUDEN
BRIAN M. CLOUDEN
SHAWN P. MCLAUGHLIN
JENNIFER L. JUREK, CFP®, CDFATM
JEFFREY L. HAXTON, CFP®
SUMMER M. MCKELLAR

If available, please bring these items with you:

- *A copy of last year's tax return, current wills, trusts and/or business arrangements;*
- *Copies of all bank statements which include: account numbers, interest rates, maturity dates, account balances;*
- *Copies of all IRA, TSA, 401 (K) statements which include: account numbers, interest rates, maturity dates, account balances;*
- *Any life, disability and/or nursing home policies (including premiums and/or recent dividend statements, policy loan balances, etc.);*
- *Mutual fund statements;*
- *Lists of stocks and/or bonds (statements or shares);*
- *Annuities (including annual reports);*
- *Any pension and/or retirement data;*
- *Any data on money owed (dollar amount, interest rate, and balance due);*
- *Any other financial data you feel pertinent;*
- *Any Home owners, Auto and Umbrella policy Insurance Declaration Pages.*

The more data we have, the better we are able to serve you.

Thank You!

P.S. All data is strictly confidential!!

Sgroi Financial, LLC

965 Union Road • West Seneca, NY 14224 • **716-674-6700 • 800-989-6710 • (fax) 716-674-6822**
info@sgroifinancial.com • www.sgroifinancial.com

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