

## **PWO Setup Client Checklist**

Please review the below list and bring as much information as possible to your PWO Setup Meeting. NOTE: Below assumes you have already setup online access. If you have not, please establish prior to meeting and bring your login credentials with you. If you are unable to setup online access, please bring a recent statement.

Logi	Login information for the following	
	Investment Accounts	
	Bank Accounts/ Credit Union	
	401(k) 403(b), IRA, ROTH IRA	
	529 Plans, UTMA Accounts	
	Stock Option Accounts	
	Annuity	
	Pension	
	Social Security	
	Mortgage	
	Loan – Personal, Car, Student, Boat etc.	
	Life Insurance	
	Credit Cards	
Values for:		
	Real Estate	
	Personal Property	
	Business	
	Accounts without online access	

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