MPS LORIA FINANCIAL PLANNERS, LLC
A Registered Investment Advisory Firm

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.

- ❑ 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