

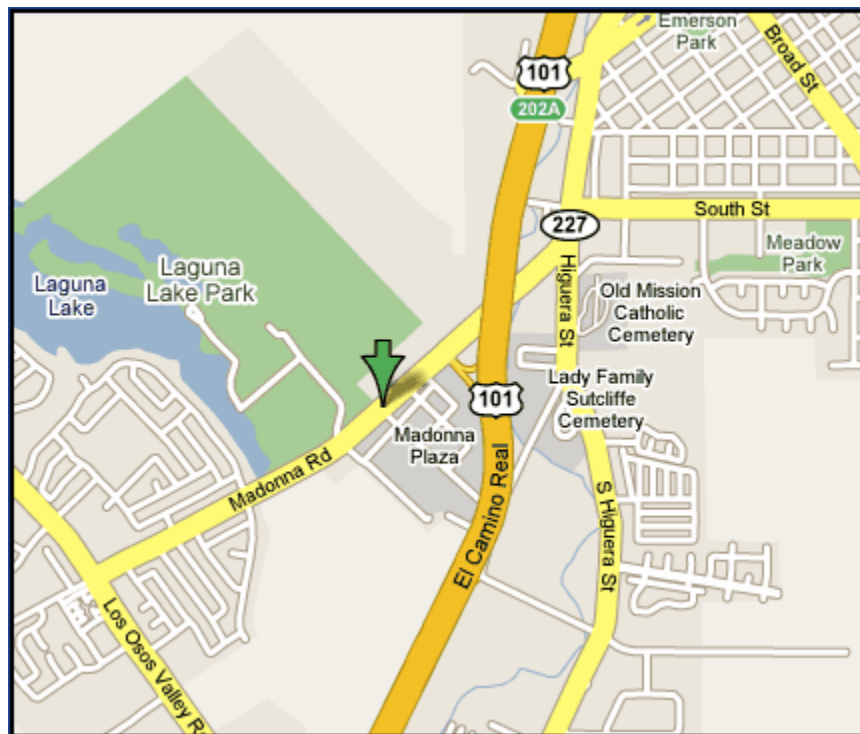
# BLAKESLEE & BLAKESLEE

299 Madonna Road / San Luis Obispo, California 93405 / (805) 543-4366

So that your appointment with us will be as beneficial as possible, please bring with you the following items and/or information if appropriate:

- ✓ Tax returns for the last two years
- ✓ List of assets and interest they generate
- ✓ List of debts and interest rates charged
- ✓ Earnings pay statements – withholding statements for the latest month
- ✓ Latest statements from IRA, TSA, Keogh, or other retirement plans.
- ✓ Latest statements from brokerage accounts
- ✓ Latest statements from mutual funds
- ✓ Last will and trust documents
- ✓ Life and disability insurance policies, including annuity policies
- ✓ Homeowners and auto insurance policies
- ✓ Deferred compensation and stock option agreements.

We look forward to meeting with you!



The Darnell Financial Planning Team

Our team's email address is [DarnellTeam@SLOFinancialPlanning.com](mailto:DarnellTeam@SLOFinancialPlanning.com)