



Thank you for your interest in Bonnett Wealth Management.

To make our first meeting as productive as possible, please gather the following information to bring to your appointment:

- Your last two years' income tax returns
- List of all debt showing current balance(s) and interest rate(s), if any
- List of all real estate investments (including mortgage(s) and/or equity loans)
- Current bank statements, if any
- Current mutual fund statements, if any
- Current brokerage account statements, if any
- Life, Disability, Long-term Care, and/or Nursing Home insurance policies and/or annual statements, if any
- Current employee benefit statements (including: pension plan, 401(k), Simple IRA, SAR/SEP, group insurance, etc.), if any
- Individual stocks held, number of shares, cost basis, and dividend reinvestment statements, if any
- Any accounts for your child(ren) (including: UGMA/UTMA, Education IRA, 529 College Savings Plans, government savings bonds, etc.), if any
- Legal documentation (including: Will, Trust, Power(s) of Attorney, QDRO, Divorce Decree, child support and/or alimony schedule, etc.), if any
- Latest Social Security Benefit Estimate

And anything else you believe would be useful in gaining a better understanding of your financial situation. When original documentation is provided, my staff will make copies for our records and the originals returned to you. If you have any problems locating any of the information, please give me a call so I can help direct you to the proper source to obtain the necessary information.

At Bonnett Wealth Management, we understand the importance of any financial decision and take a personal interest in all our clients. We are here to assist you and your family to create and preserve wealth, prepare for retirement, and assist with estate and insurance plans. If you have any questions, please don't hesitate to contact our office. I look forward to exploring how I might be able to assist you in achieving your financial goals.

Sincerely,

A handwritten signature in black ink that reads 'Joe Bonnett, Jr.' in a cursive, flowing script.

Joe P. Bonnett, Jr.
President

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