The following are examples of accounts that you may have that will help us create your overall financial picture. If you own any of the following accounts, please bring recent statements to your initial meeting.

TEAM
Wealth Planning and Management, Inc.

☐ Brokerage Accounts

☐ Savings Accounts/Certificates of Deposits

☐ Trust Accounts

☐ Individual Retirement Accounts (IRA)

- Traditional IRA
- Rollover IRA
- Inherited IRA (DBA)
- Roth IRA

☐ Employee Sponsored 401k, 403b or 457 plans

☐ Pension Funds

☐ Education Savings Accounts (529 plans or Education Trusts)

☐ Employee Stock Purchase Plans (ESPP)

☐ Health Savings Accounts (HSA)

☐ Restricted Stock Units (RSU)

☐ Options – ISO and NQSO

☐ Employee Stock Ownership Plan (ESOP)

☐ Stock held in Individual Certificates