



**ANNUAL REVIEW QUESTIONNAIRE**

1) Have you had any major changes during the last year that you would like to share (e.g. career, major purchases, family, etc.)?

2) Are there special questions or concerns you would like to discuss during our annual review?

3) Please upload the following documents into your online vault, prior to our meeting, if applicable:

- \_\_\_\_\_ Recent federal, state, and local tax returns (we **need these every year**)
- \_\_\_\_\_ New/updated social security statements and/or pension statements
- \_\_\_\_\_ New/updated insurance policies (property/casualty, life, disability, umbrella, long term care, etc.)
- \_\_\_\_\_ New/updated estate planning documents (wills, health care directives, durable power of attorney)
- \_\_\_\_\_ New budget or any information needed to update your retirement plan

Thank you very much for completing this questionnaire for your annual review. **Please upload it, along with any supporting documents, no later than 2 days before our scheduled meeting.**

Signature(s) of party or parties filling out this form:

\_\_\_\_\_ Date: \_\_\_\_ - \_\_\_\_ - \_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_ - \_\_\_\_ - \_\_\_\_