SHERRILL
WEALTH MANAGEMENT

R. Gardner Sherrill, MBA, CFP®
Principal

Please complete the information below and bring it with you to your appointment.

Name ______________________________ *DOB* ____________

Occupation: ______________________________ Retired: Yes ☐ No ☐

Spouse ______________________________ *DOB* ____________

Occupation: ______________________________ Retired: Yes ☐ No ☐

Address ______________________________

City______________________ State ________ Zip ______

Phone (Home) ________________ Phone (Cell) ________________

Email Address: ______________________________

What are you biggest financial concerns? ______________________________

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Primary Questions for Gardner: ______________________________

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In order to advise you best, it is our approach to take a comprehensive look at your financial situation. This will be accomplished if you will bring complete sets of the following documents:

- Retirement Plan Statements (i.e. 401k, 403b, 457, etc.)
- All other Investment Account Statements (i.e. IRA, Trust, Taxable, etc.)
- Life Insurance and Long Term Care Insurance Statements
- Recent Tax Returns – all pages, for 2 years
- Estate Documents (i.e Will, Trust, Powers of Attorney)
- Social Security Statements (goto: www.ssa.gov)

If you are unable to bring these documents to your appointment, please contact us to re-schedule. You will not need to share these with us until you decide to move forward to a second meeting.