

Review Checklist

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Ballesteros Family Insurance Services, Inc
CA License # OF50028

In order to help you set and achieve your financial goals, I like to review your accounts at least every two years. Please "Check off" from the list below any areas that you would like to discuss or anything that may have changed since we visited last. Please call our office for your free review. You may also fold & mail this sheet back to our office or fax it to 800 549-8070. *Thank You!*

Plans of Interest

- Retirement Planning
- Long Term Care Insurance (LTC)
- Life Insurance
- Disability Insurance
- Health Insurance
- Medicare Supplements turning age 65**
- Dental & Vision Insurance
- Tax Shelter Annuity (403b/TSA)
- Deferred Compensation Plan (457 Plan)
- Term Life Insurance
- Mutual Funds TSA, Roth, IRA
- Variable Annuities (403b/ IRA)
- IRA 's
- Roth IRA's- tax management**
- Equity Indexed Annuity-TSA
- Survivor Income Benefit Plan
- Tax Management and reduction plans**

Please Check One

- Call Me
- Schedule Appointment for general review
- No Need to Contact Me (**no changes**)
- Set up a Zoom Meeting

I Would Like to Discuss/Update

- Retirement Income
- College Educational Funding
- Child/Spouse Insurance
- Spouses Retirement Program
- Increase Contributions
- Add Life Insurance/Mortgage pay-off
- Add Guaranteed /TSA to my program
- Add Mutual Fund Investments /UGMA accounts
- Restart/Change my retirement program
- Change Beneficiaries!?!?**
- Change Marital Status
- Change School Districts
- Change Address/ Email Address**
- Change in health
- Stopped Smoking
- Received an Inheritance / CD Alternatives
- Change Investment Options
- New Employment /Employer

Call Toll Free 800 549-7476

Please return this form by refolding and mailing or FAX to (800) 549-8070.

Thank you!

Name _____ E-Mail _____

Home Phone Number _____ Cell/text Number _____

City _____ Zip _____ Contact time: _____ School District _____

Comments: _____

Referral, please contact: _____ Phone: _____

Referral, please contact: _____ Phone: _____

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Securities offered through Parkland Securities, LLC, member FINRA/SIPC
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