UBS

Talk to an Advisor Checklist

- ❑ Financial and estate plans
- ❑ Savings and checking accounts
- ❑ Emergency funds
- ❑ Expenses
- ❑ Pensions and Social Security
- ❑ Retirement accounts
- ❑ Investment accounts
- ❑ Life insurance policies
- ❑ Long-term care policies
- ❑ Loans, credit lines and other debt
- ❑ Trust accounts
- ❑ Real estate
- ❑ Annual gifting
- ❑ Charitable giving