

# ENGAGEMENT CHECK LIST

## YOU'LL NEED ...

- Laptop or tablet
- Driver's License - yours and spouse if applicable
- Primary and contingent beneficiary information for each account (name, DOB, SS# optional)
- Trusted contact information for each account (name, address, phone number; up to 2 people)
- \*Upload digital copies of most recent statements for accounts GIA will be managing; the documents should state:
  - full account number (if applicable)
  - your name
  - your address
- Bank statement(s) for the account(s) you are linking to your investment account(s); routing and account numbers needed
- If you have an inherited IRA, please \*upload a copy of the death certificate
- Contact information for anyone named on your accounts who is not present; e-signatures are often required

*\*While uploading documents to our secure portal is preferred, you may also bring physical copies that we can scan.*