CaseCentral

CASE INFORMATION NEEDED

Case Central is excited to work with you on your next case! In order to receive Case Central's full suite of services, please provide the following information:

1. **Financial Goals and Concerns**

2. **Projected Retirement Date/Age**

3. **Retirement Income Goal (Specify Gross or Net)**

4. **Income Sources**

   a. Current and Future
   b. Social Security – Primary Insurance Amount

5. **COMRA Score**

6. **Complete Account Statements**

   a. If affiliated with Gradient Investments, Gradient Securities, or Gradient Advisors, full statements allow us to complete a Portfolio Analysis Review.
   b. NQ account statements often provide Cost Basis information, helping us better understand potential tax implications.
   c. Annuity and Life Insurance statements provide key data such as Issue Date, Rider Information, Income Value, Death Benefit, and Surrender Value.
   d. Employer plan statements display the different tax types held in the account (pre-tax, roth, after-tax) and current contribution amounts.

7. **Unable to Obtain Account Statements? Please Provide a Full List of Accounts Including Ownership, Product Type, Tax Type, and Value.**

8. **Most Recent Tax Return**