



BLUEPRINT DOCUMENTATION LIST

Please provide us with the following documentation so that we may more accurately prepare your financial blueprint.

_____ Social Security Benefit Statement or simply provide us with your benefit amount.

_____ 401(k) Statement(s)

_____ Roth IRA Statement(s)

_____ Current Statement for any other Financial Account(s) (mutual funds/brokerage accounts/annuities, etc.)

_____ Bank Statements/Certificate of Deposit Statements

_____ Current Statement for any other Retirement Account(s)

_____ Mortgage Statement(s)

_____ Cash Flow and Expense Worksheet (Optional)

Visit infinityfinancial.org, click on Learning Center, then Cash Management, and lastly Cash Flow Analysis

Should you have any questions, please call our office at (708) 410-0400. Thank you.

SAI #309131/#309132 Feb. 4, 2011

1127 S. Mannheim Road, Suite #205, Westchester, IL 60154 P 708.410.0400 F 708.410.1360
jim@infinityfinancialconcepts.com www.infinityfinancial.org joe@infinityfinancialconcepts.com

Securities offered through Securities America, Inc. Member FINRA/SIPC.

James C. Hinchliff and Joseph A. Schoenhardt, Registered Representatives.

Advisory services offered through Securities America Advisors, Inc.

James C. Hinchliff and Joseph A. Schoenhardt, Financial Planners.

Infinity Financial Concepts and the Securities America companies are unaffiliated.