



## Financial Fitness Checklist

The doctor is in! Visit any LBS Financial branch on one of the dates below for your free financial health checkup. Update your account, beneficiaries, and get a free rate and insurance review! Make sure you are getting the best possible deal on your financial products and services.

- January, 17, 2020
- January 24, 2020
- January 30, 2020
- February 7, 2020

### Bring these documents with you to make the most of your visit!

- Statements or billing notices from your other financial institution(s) for any of the following:
  - ✓ Auto loan or other vehicle loan
  - ✓ Home loan
  - ✓ Credit card(s)
  - ✓ Personal loan(s)
  - ✓ CDs or Share Certificates
  - ✓ Money Market accounts
  - ✓ Checking account(s)
  - ✓ Home or auto insurance (declaration statements)



### Investment or Retirement Review?

If you are interested in an investment/retirement review, we can schedule a separate appointment for you with our Financial Consultant. Please call 800.527.3328, ext.4314 to schedule an appointment with Tom Corrado directly.

