Portfolio MRI Investment Records Checklist for Tax Efficiency and Risk Evaluation

Investment Statements needed for your Portfolio MRI

Date of Statement	Date Obtained	Item
____________	____________	**Bank CD's (Statements** and date of maturity)
____________	____________	**Brokerage account statements** (Current – include Basis)
____________	____________	**Mutual fund statements** (year end preferably). IRA/SEP/Simple/Keogh/401k/ Pension/profit sharing plan accounts
____________	____________	**Limited Partnership & REITs**
____________	____________	**Money Market account statements**
____________	____________	**Savings Bonds** (amount, type and date of purchase)
____________	____________	Trust account composition and statements

Forward all information to:
Finish Rich Now, LLC

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