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Find the Money Questions

- What do you have coming up in the next year or so that I should be prepared for?
 - (LIKE WHAT?) Oh, a tax refund, bonus, inheritance, property sale, things like that.
- When do you and [SPOUSE] plan to retire?
 - (IF SOON) Ballpark, what do you expect your 401(k) balances will be?
 - Do you have any 401(k) accounts from previous employers?
- What **investments do you own**, say with another firm or in the safe deposit box, which you might like a second opinion on?
 - Any CDs, annuities, REITs, or things like that?
- Do your parents ever gift **their grandchildren** with money?
(*and/or*)
Do you ever gift **your grandchildren** with money?
- Any **bonds** maturing in the next year or so?
- Aside from your regular job and investments, do you have any other income streams I should know about, like from a property you are renting?
- Is there anything else at all I should be prepared for?