

## MATERIALS TO BRING TO YOUR FIRST MEETING

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Financial planning advice is most effective when your advisor has a good understanding of your personal goals and objectives, fears and concerns, and dreams and aspirations. It's equally as important that we understand your complete financial picture—not just a part of your financial affairs. With that in mind, please bring the following documents, as applicable, to your first meeting with us, so we can take a detailed look at your personal assets, investments, pensions, and real estate.

- Names and contact information of individuals who provide you with financial advice (attorney, accountant, banker, insurance agent, etc.)
- Rough outline of your monthly expenses (expense worksheet)
- Copy of your pay stub
- Employment benefits description
- Most recent IRS tax return
- Most recent 401(k) statement and supporting plan documents
- Pension plan information
- Recent statement of all open credit card accounts
- Most recent bank statements
- Stock certificates
- Brokerage account statements
- IRA statements
- Home/renter's/auto insurance policies
- Life insurance policies and most current annual statement
- Long-Term care policies
- Copy of your will/trust
- Contact information for the spouse or partner, if any, with whom you will be making financial decisions



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