

What to Bring

It is not mandatory that you bring anything to the first meeting; however, it is helpful for discussion purposes. Please bring current statements for:

- Net Worth Statement
- Cash Flow Analysis (Budget)
- Certificates of deposit; include interest rate and maturity date
- Government bonds, savings bonds, treasuries and corporate bonds
- Brokerage Accounts
- Stock Certificates
- Dividend Reinvestment Plans
- Mutual Funds
- Annuities; including investment options
- Individual Retirement Accounts (IRA); including copies of each IRA and your company Pension/Profit Sharing or other retirement plans, including investment options
- Your will and/or trust documents and your powers of attorney for health care and finances
- List of beneficiary designations on all of your annuities, life insurance, and retirement accounts
- First mortgages, second or home equity loans; include your interest rate and mortgage term. Include any notes that are payable to you
- Insurance Policies: homeowners, automobile, disability, long term care, funeral, and life insurance
- The last two years tax returns
- Your Social Security benefit statement
- Pertinent business or partnership information, if applicable



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