



WHAT TO BRING TO THE FIRST MEETING:

The following is a list that will be helpful information for us to review during your first meeting. This information provides the most comprehensive view of where you currently stand financially. Bringing in as much information as possible provides our advisors a clearer picture of the best way to help you reach your tax and financial goals. All items on the checklist may not apply to you at this time; however, the list can be a helpful guide as you gather the items that apply currently to your family.

Recent income and identity documents, such as:

- Current salary information
- Last year's tax return (Unless you are a current tax client)
- Birth date(s), address(es), Social Security number(s) (for your spouse and beneficiaries, if applicable)

A list of your average monthly expenses, including:

- Mortgage or rent
- Credit card payments
- Other loan payments (such as student or home equity loans)

Most recent statements from any existing accounts, such as:

- 401(k) or other employer-sponsored retirement plans IRAs
- Bank accounts and CDs
- Brokerage accounts (Investments, etc.)
- Trusts, will(s)
- Insurance policies

A list of goals or questions:

- Any long- or short-terms goals you have for your money (for example, planning for a vacation, buying a house, saving for college or planning for retirement)
- How soon you hope to achieve any of these goals
- What questions or concerns you have about investing

- Whether you are expecting or have experienced any significant life changes, such as changing jobs, getting married or divorced, death in the family, empty nest, or having a child or grandchild.