Client Meeting Checklist

Please bring the following information to our next meeting:

____ Top three short term financial goals and your top three long term financial goals

____ List of monthly income

____ List of monthly expenses

____ List of any large annual or quarterly expenses (such as insurance payments)

____ Copies of your most recent monthly/quarterly statements for all your retirement accounts

____ Copies of your most recent monthly/quarterly statements for all your other investments

____ Copies of the most recent monthly/quarterly statements for your children's investments

____ Copy of your most recent tax return (federal and state)

____ Copies of a recent pay stubs and/or Earning & Leave Statements

____ Annual (green) Social Security Statement found at www.ssa.gov

____ Retirement pension and retirement benefit report from your human resource department (if you plan to retire in the next 18 months)

____ Approximate current value, copy of a recent mortgage payment statements for your home and investment real estate

____ Recent Credit Score (FICO) numbers

____ Copy of your will, advanced medical directives, powers of attorney and/or trust documents

____ Completed Pegasus Financial Group's *Financial Planning Profile*

4211 Pleasant Valley Road #260
Chantilly, VA 20151
P: 703-956-6662 F: 703-956-6334