

What to Bring to your First Meeting

Retirement Planning

- Most recent statements from IRAs, 401(k)s and other retirement plans
- Deferred Compensation and stock option agreements
- Pension/profit sharing plans
- Social Security statements
- Business documents (buy-sell agreements, etc.)
- Employee benefits booklet

Investments

- Most recent statements from brokerage accounts, mutual funds, etc.
- Annuity policies
- Checking/Savings accounts and CD statements
- Paycheck stubs
- Real estate purchases, escrow and loan documents

Debt

- Mortgage statement
- Credit card statement
- Miscellaneous loans – Car, School, Personal, Lines of Credit

Tax Planning & Strategy

- Personal tax returns for the last two years
- Business tax returns (if applicable) for the last two years

Estate Planning

- Trust Documents
- Wills, Powers of Attorney, other planning documents
- LLCs or other legal entity information

Risk Management

- Life insurance policies, recent statements
- Disability coverage information
- Medical insurance, HSA information
- Long-Term care policy
- Homeowners & auto insurance declaration pages

Please bring any of the following documents that pertain to your situation.

Photocopies will be made and the originals will be returned to you at our next meeting.