Materials to Bring to Your Meeting

Financial planning advice is best given when the advisor has a good understanding of your personal goals and objectives, fears and concerns, dreams and aspirations. Therefore, it is imperative to your future financial success that we are able to obtain your complete financial information—not just a part of your financial affairs. We request that you provide full details on personal assets, investments, pensions, and real estate. Below is a list of the documents and information we request that you bring to your first advisor meeting.

* **A Rough Outline of Your Monthly Expenses (Expense Worksheet)**
* **Copy of Your Pay Stub**
* **Employment Benefits Description**
* **Most Recent Employer Retirement Plan Statement (401k, 457, etc)**
* **Employer Retirement Plan Choices/Selections**
* **Pension Information**
* **Brokerage Account Statements**
* **IRA Statements**
* **Life Insurance Policies and Most Current Annual Statement**
* **Long Term Care Policies**
* **Disability Policies**
* **A Copy of Your Will/Trust**
* **CD Maturity Dates**
* **Most Recent IRS Tax Return**

Parkway Financial Group
850-696-0133
www.parkwayfinancialgrp.com