

# Suggested Documents To Bring To First Meeting

- ☑ Driver's License
- ☑ Tax Return from previous year
- ☑ 401 (k) statement
- ☑ W-2 forms
- ☑ Monthly expenses including credit cards, mortgage, rent or loans
- ☑ Investment information (stocks, bonds, mutual funds, etc.)
- ☑ Copy of most recent Social Security statement
- ☑ Checking and Savings account statement
- ☑ Payroll stub for self and spouse
- ☑ Pensions or retirement plans
- ☑ Any employee benefits, such as stock options or deferred compensation plans
- ☑ Wills and other estate planning documents
- ☑ Other retirement information (IRAs, annuities, etc.)
- ☑ Insurance documentation/ policies