



Preparing for your Financial Planning Meeting

We request the following information be provided to our office no less than 3 business days before your meeting in order for Wendi to prepare. Please submit all documents via your secure SOS online account, or drop them off at our office. If you stop by outside our current office hours (please check website, social media, or contact us for details), please slide the documents under our suite door and we'll let you know we've received them the next business day.

- Investment account statements (most recent quarter or month)
- Bank account statements showing value & positions (CDs, money markets, etc)
- Social Security information (estimate of earnings at retirement, always helpful, but not required by us until age 55)
- List of other assets (Homes, personal property, rental property, collectibles)
- List of liabilities (Debts, mortgages, loans, etc)
- Current contributions and savings (401(k)s, 403(b)s, IRAs, savings accounts, etc)
- All sources of income (current paystubs, contractor payments, honorariums, etc)
- Required or expected monthly expenses (Required, minimums, budget amounts, etc)

Additional topics you should consider or discuss with your family prior to meeting with Wendi:

- When do you each want to retire?
- How much money will you need to live on during retirement?
- What are your current monthly expenses?
- What are your goals? (Travel, new cars, boat, vacation home, etc)
- How much do you want to contribute or save for your children's education?
- Do you anticipate any inheritances?