HOFF, BUJNOCH & ASSOCIATES
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What to Bring to Your First Meeting

- Copy of the last 2 years tax returns
- Social Security benefit statements
- Defined Benefit / Defined Contribution statement
- Employer Benefit Booklets: Life, Disability Income, Health, Retirement
- Budget and/or Cash Flow management figures
- Amount that is being saved on a systematic basis (for example, monthly to your employer's 401k), as well as any matching/profit sharing contributions provided by your employer
- Statements from investment accounts, including names of funds/other securities, with most recent quarter-end values
- For non-retirement accounts, please provide tax cost basis (initial purchase amount, plus any reinvested distributions)
- For investment accounts with beneficiaries, please list who is primary and who is contingent beneficiary
- Bank statements showing balances, interest rates & ownerships of checking, savings, and CDs (also maturity dates)
- Estate Documents: Living Trusts, Wills, Living Wills, Durable Powers of Attorney for Health, Durable Powers of Attorney for Financial Management, Personal Health Care Directives, Irrevocable Life Insurance Trusts, etc.
- Approximate value of real estate, type of ownership (individual, joint, trust, etc.)
- Mortgage information (fixed or adjustable rate, balance remaining, interest rate)
- Car loan information (balance remaining, interest rate)
- Credit card balances and applicable interest rates
- Annual statements from life insurance policies detailing type of coverage, death benefit, cash value, owner, beneficiary designations, premium payer
- Long Term Care Insurance policies
- Any information you believe will be pertinent to the meeting