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**First Wealth Management Meeting Checklist**

The following information allows us the opportunity to provide recommendations that are both customized and specific to you and your tax and financial situation. Some of the items on the checklist may not apply to you at this time. If we prepare your tax return, we may already have some of the following information.

**Recent Income and Identity Documents**

* Current salary information
* Prior year tax return (unless you are an ENJ Tax Client)
* Birth date(s), Social Security number(s), address(es) for your spouse and beneficiaries – if applicable

**List of Average Monthly Expenses**

* Mortgage or rent
* Credit card payments
* Other loan payments (Student loans, home equity loans, etc.)

**Most Recent Statements from Existing Accounts**

* 401(k) or other employer sponsored retirement plans
* IRA’s, bank accounts, and CD’s
* Brokerage accounts (investments, etc.)
* Trusts, will(s)
* Insurance policies

**Goals or Questions**

* Long or short-term goals you have for your money – purchasing a new home, saving for college, retirement, travel, etc.
* Questions or concerns you have about investing