

## Documents to Bring

In order to provide the most comprehensive analysis possible, we ask you to gather all the financial information you can. The information you provide will determine how comprehensive the financial analysis will be. Please use the following checklist as a guide.

### Investment and savings statements

- Bank account statements
- Account statements for any investments you own
- Employment benefits statement
- Retirement/401(k) plan statements
- Social Security statements

### Income and cash flow information

- Family Budget
- Pay stubs
- A list of future funding requirements: second home, college expenses, etc.

### Documents related to your debts (amounts you owe).

- Mortgage information
- Credit card statements
- Student/other loan statements
- Auto loan statement

### Legal documents

- Property or investment agreements
- Pre-nuptial agreements/divorce settlements
- Property settlement agreements
- Current Will or Trust(s)

### Insurance policies

- Life insurance policies
- Disability insurance policies
- Long Term Care insurance

### Family Information

- Account statements for children's investments if applicable
- Care information for parents if applicable

### Prepare to discuss

- Please come prepared to identify your short and long term financial goals.