

## CHECK LIST: Items to Bring

Here is a list of common items people bring to their first meetings with us, depending on the questions they might have. Please bring all the following information to our first meeting, if possible. If a document listed below does not apply to you, please disregard. Based on our conversation, highlight are the items of most importance.

### Income / Tax Planning

- Your most recent Federal & State Income Tax Return
- Your most recent Pay Stub (and that of any other party included in this document – spouse, etc.)
- Most recent Social Security Benefit Statements
- Most recent Pension and/or Disability Income Statements

### Investment Statements

- Information of all rental properties (Taxes, Insurance, Income, Expenses, etc.)
- Your most recent Investment Accounts, Mutual Funds, Brokerage Accounts, and Annuity Statements (IRAs, 401k, etc.)
- 401k Plan documents (including those that describe options, choices within the 401k)

### Debt

- Your most recent mortgage, credit, and other debt statements.
- Terms of the debt (Min. payment, pre-payment penalties, fixed or variable rate, rate, etc.)

### Estate Planning

- Wills
- Durable Power of Attorneys
- Health Care Proxy or Living Wills
- Most recent Trust Documents or Statements
- Most recent Annual Statement on Life Insurance Policies

### Employer Benefits

- 401k Plan documents and choices within the 401k

- Most recent Stock Option Statements of Award and Vesting
- Most recent Employee Stock Purchase Plan Statements
- Group Benefits Statement or Booklets

Property Insurance

- Your Home Owner/Renter Insurance Policy Coverage Sheets
- Your Auto Policy Coverage Sheets

Any Other Financial Items \_\_\_\_\_

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