Materials to Bring to Your First Meeting

Financial planning advice is best given when we are able to look at all of your financial information. Please bring any of the following items that you have to your first meeting with us:

- ☐ The Names and Contact Information of Individuals Who Provide You with Advice Related to Your Finances (Attorney, Accountant, Banker, Insurance Agent, Etc.)
- ☐ Your Spouse or Any Other Person with Whom You Will Be Making Financial Decisions
- ☐ Copy of Your Pay Stub
- ☐ Employment Benefits Description
- ☐ Most Recent IRS Tax Return
- ☐ Most Recent 401(k) Statement
- ☐ 401(k) Choices/Selections
- ☐ Pension Information
- ☐ Recent Statement of All Open Credit Card Accounts
- ☐ CD Maturity Dates
- ☐ Money Market Statements
- ☐ Currently Held Stocks and Number of Shares
- ☐ Brokerage Account Statements
- ☐ Face Amount of Series E, EE, and HH Bonds
- ☐ IRA Statements
- ☐ Latest Declarations Page from Auto, Home/Renter's, Disability Insurance
- ☐ Life Insurance Policies and Most Current Annual Statement
- ☐ Long Term Care Policies
- ☐ A Copy of Your Will/Trust

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