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During this meeting we will spend our time reviewing your current financial situation, and understanding what expectations you have for the future.

This meeting enables me to gain a better understanding of your goals, what's important to you, what's not important to you, etc. as well as allowing you the opportunity to learn more about me, my staff, and our philosophies. The below documents are necessary for us to provide you with an accurate analysis of your financial picture and identify possible strategies that are in line with your goals.

Please rest assured that all conversations and documents provided are kept completely confidential. Please bring all applicable documents with you when you come.

FINANCIAL PLANNING & WEALTH MANAGEMENT CHECKLIST

- Last 2 years Income Tax Returns
- Investment Account Statement(s)
- Social Security Statement (*if not currently receiving Social Security*)
- Medicare Statement
- Pension Statements and/or Estimates
- Outstanding Loan Statements (*Auto, Home, Credit Card, etc.*)
 - Balance
 - Rate
 - Term
 - Maturity Date
- Life Insurance and Long Term Care Insurance Policies & Statements
- Savings Bonds
 - Serial Number
 - Month & Year of Purchase
- Annuity Statements
- Listing of Real Estate Holdings
 - Purchase Price & Current Value
 - How it is Titled
- Wills and/or Trust Documents

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