What to Bring to Your First Meeting

Tax Information

- ☐ Copy of last year's tax return

Bank Statements & Credit Card Balances

- ☐ Bank statements showing balances & interest rates of checking, savings, and CDs (also maturity dates)
- ☐ Credit card balances and applicable interest rates

Benefit Statements

- ☐ Social security benefit statement (available online www.ssa.gov or call 1-800-772-1213)
- ☐ Pension benefit statement

Investment Information

- ☐ Amount that is being saved on a systematic basis (for example, monthly contributions to your employer's 401k), as well as any matching/profit sharing contributions provided by your employer
- ☐ Statements from investment accounts, including the names of funds or other securities, with recent values
- ☐ For non-retirement accounts, please provide tax cost basis (initial purchase amount, plus any reinvested distributions)
- ☐ For accounts with beneficiaries, please list who is primary and who is contingent

House & Car Information

- ☐ Approximate value of real estate, type of ownership (individual, joint, trust, etc.)
- ☐ Mortgage information (fixed or adjustable, balance remaining, interest rate)
- ☐ Car loan information (balance remaining, interest rate)

Insurance Information

- ☐ Statements from life insurance policies detailing type (term, universal, whole, variable), death benefit, cash value
- ☐ Other insurance information, including disability, auto, and liability

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