

**Meeting with an advisor and not sure what you are supposed to bring?** Use the following checklist for examples of useful items to bring to your financial planning appointment. However, do not worry about gathering up every item listed below. Bring yourself and we will figure out the rest together.

## BASICS

- Contact Information  
(Phone Numbers, Emails, Address)
- Spouse and/or Dependent Information
- Financial Goals and Priorities when Working with an Advisor
- Annual income, Expenses and Savings

## INSURANCE

*\*Individual and Employer Provided*

- Life
- Disability
- Long Term Care
- Property & Casualty  
(Home, Auto, Boat, Umbrella, etc.)

## TAX

- W-2 or Pay Stubs
- Recent Year's Tax Return

## ESTATE

- Will
- Trust
- Power of Attorneys
- Living Will

## ASSETS/LIABILITIES

### INVESTABLE ASSETS *\*Statements/details about investments*

- Checking, Savings, Money Market Accounts
- Brokerage Accounts
- Retirement Accounts (Individual and Employer)  
Mutual Funds, Stocks, Bonds

### OTHER ASSETS

- Home
- Rental Properties
- Business

### LIABILITIES *\*Current Balance, Interest Rate, Term, & Maturity Date*

- Mortgage
- Student Loans
- Auto Loans
- Credit Card Debt or Personal Loans

## SOCIAL SECURITY

- Visit [www.ssa.gov](http://www.ssa.gov) for updated projection.  
(Click "mySocialSecurity" to create an account.)

*If you utilize online accounts instead of paper statements, please feel free to bring your user name and password and we can save the documents to our files securely.*