

Preparing For Your Meeting

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 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.

Locations:



501.520.3660

CommunityFirstTrust.com

