

## List of Items to Gather

The following is a sample list of items we ask you to gather in advance of our first meeting. The actual list may vary depending upon specific goals and circumstances. To make our first meeting most productive, we ask that you forward this information to our office at least one week prior to the scheduled meeting.

- Copies of your most recent tax returns (Federal and State) including all schedules.
- Insurance policies: life, disability, medical, long-term care, homeowners, auto, umbrella liability.
- Copies of the latest statements for any investments you own.
- Statement of any current stock options.
- One month's worth of pay stubs.
- Details on your current employee benefits.
- A listing of all assets and liabilities. Include a recent statement for mortgage and any other liabilities. Include purchase price and date of purchase for real estate and current market value.
- Wills, trust, powers of attorney, if any.
- Names of designated beneficiaries for all accounts.
- Social Security statements of estimated benefits. If you do not have a recent statement, you can request one by going to: <https://s044a90.ssa.gov/apps6z/issr/main.html>
- Budget information.
- Your latest retirement plan statements.
- A prioritized list of all financial goals: short-term (next 12 months), intermediate (12 months to 5 years), and long-term (example: retirement, college funding, debt reduction, new home or second home purchase, etc.)
- A listing of all family members, ages, official names, nicknames, grade in school, and health problems, if any.