

FIRST APPOINTMENT CHECKLIST

Please review the following list and bring the most recent copies of these documents to your first appointment:

- ✓ Bank statements
- ✓ Brokerage statements
- ✓ Mutual Fund statements
- ✓ Employer retirement plan statements, with list of beneficiaries
- ✓ IRA statements, with list of beneficiaries
- ✓ Pay stub
- ✓ Past 3 years tax returns
- ✓ Annual Social Security Statement
- ✓ Mortgage statement
- ✓ Itemized list of all debts including: lender, balance, interest rate, term, and monthly payment (principal and interest only)
- ✓ Annual budget
- ✓ Will and trust documents
- ✓ Life insurance statements, with list of beneficiaries
- ✓ Disability insurance statements
- ✓ Long-term care documents
- ✓ Any other relevant statements or documents