YOUR DOCUMENT CHECKLIST

Our (initial/next) meeting is coming up. Here's what you'll need to have on hand.

NEXT MEETING DATE: ____________________________ TIME: __________________________

☐	Completed copy of "Your Financial Inventory" worksheet
☐	Statements from pensions or other employer-benefit income that you receive
☐	Social Security statement(s) or check stub(s)
☐	Most recent federal income tax return
☐	Statements from bank accounts (summary pages)
☐	Statements from investment/brokerage accounts
☐	Statements from retirement accounts and employer-sponsored benefit programs (401(k), 403(b), 457, etc.)
☐	Statements from annuities you own
☐	Outstanding balances of loans (mortgage, auto, credit card, business, equity line, etc.)
☐	Estate planning documents (will, power of attorney, trust, etc.)
☐	Life and disability insurance policy
☐	Long-term care insurance policy
☐	Contact information of your CPA and attorneys or other financial professionals (tax and estate) if applicable
☐	Other ____

(I/We) look forward to seeing you soon.

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