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# PRE-MEETING CHECKLIST

*The following documents will be needed for the purpose of study and analysis in an effort to prepare a personal financial plan for you. It is understood that this information will be treated confidentially and returned as soon as the planning process is complete, or at an earlier time if requested.*

**Items needed:**

Investment Statements

- ❑ Brokerage accounts
- ❑ 401k Statements/ESOP/Profit Sharing or login
- ❑ IRA Accounts
- ❑ Stock Option Statements
- ❑ College Savings Plans
- ❑ Any other accounts *(CD's, Direct Mutual Finds, etc.)*
- ❑ Mortgage Statement(s)

Social Security Benefits

- ❑ Self
- ❑ Spouse/Partner

*Can be obtained from www.ssa.gov*

Most Recent Paystubs

- ❑ Self
- ❑ Spouse/Partner

Insurance and Annuity Policies and Contracts *(if applicable)*

*Have you reviewed your policies?*

- ❑ Life Insurance, Disability Insurance, Long Term Care Insurance, Annuity Statements

Estate Planning Documents *(if applicable)*

*Have you updated your estate planning documents?*
*Do you have questions about your estate planning documents?*

- ❑ POA, Will, Trust, etc.
- ❑ Other ______________________________________________