



What to Bring

- Income Information: Most recent pay stubs or recent W-2 or 1099. This details your income and deductions or expenses.
- Current Bank Statements: Checking, savings, and money market accounts.
- Current Investment Statements: Brokerage accounts, mutual funds, stocks, retirement plans, etc. This information will allow us to analyze your investments and make certain that they match your goals and risk tolerance.
- Recent Tax Returns: Tax return with all schedules and/or statements. Your income tax return helps us determine your tax efficiency.
- Loan Information: Mortgages, student loans, credit cards, etc. We need to know about any outstanding debt/loans so we can discuss payoff or payments.
- List of Assets: Any other items of value which are not included on account statements
- Spending Information: Quickbooks reports, Mint.com screen prints, American Express statements, back of the envelope numbers...however you chose to track your expenses. How you spend your money tells us what you really value.
- Estate Documents: Wills, trusts, powers of attorney. Any estate documents that you have had drawn up.
- Life Insurance and Disability: Policies or recent statements. We will review amounts and terms of policies.
- Property and Casualty Insurance: Declaration pages for your home, auto, boat, jewelry, umbrella, and any other policies on your things.
- Money Personality Questionnaire.