What to Bring

We're excited for your upcoming meeting and want to make sure you're comfortable and prepared. Often people wonder what type of information they should bring with them to their first meeting, so we created this list of documents that can be beneficial to you and the adviser. This list is not an exhaustive list but gives you a good idea of the information our advisers need to help you reach your financial goals. Also, we know some of these documents may not pertain to you, and that's okay. We'll talk through what is most important for your situation and make sure no stone is left unturned.

- Retirement Statements
    - 401k, 403b, TSP
    - Traditional IRA, Roth IRA
    - SEP IRA, Simple IRA
    - Pension Plan, SDRS, IPERS, FERS
    - College Plan (529), Minor Accounts (UTMA or CD)
    - Annuity

- Insurance Policies
    - Life Insurance Policy and current statement
    - Health Insurance
    - Medicare Card, Medicare Supplement Card, and Prescription Drug Plan Card
    - Long Term Care Policy and current statement
    - Disability Insurance Policy

- Debts
    - Lender, Rate, Terms, Date Started, Balance

- Know which estate planning documents you have
    - Will, Trust, Power of Attorney, Health Care Power of Attorney, Living Will

- Recent Pay Statements

- Recent Checking and Savings Statements

- Recent Tax Returns

- Social Security Statements

providing direction for your financial goals

Compass Financial Group

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