ADVISORY MEETING
checklist

Be sure to bring:

- [ ] banking account statements
- [ ] investment account statements
- [ ] mortgage account statements
- [ ] credit card account statements with account balance
- [ ] vehicle loan statements with account balance
- [ ] HELOC statements with account balance
- [ ] Personal or other loan statements with account balance
- [ ] a list of questions, goals and concerns to address
- [ ] any applicable documents pertaining to your list
- [ ] your spouse/ significant other, if you share accounts
- [ ] current/ previous financial plan(s)
- [ ] Any paperwork your advisor has asked you to complete and return
- [ ] any updated personal or contact information for yourself and/or beneficiaries
- [ ] any updated professional contacts (i.e., lawyer, CPA, insurance broker, etc.)
- [ ] updated preferred payment method(s) for your accounts

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