How to prepare for your first meeting with one of our advisors

Retirement plans – especially for Federal employees – are not one size fits all. Our first call is a data gathering meeting where we will look at both soft and hard data in order to formulate customized financial model for you in our next meeting. Below are some items we will ask about and information that would be helpful if you could have handy to make the most of your time – having either the data or copies of your statements in front of you is appreciated.

- ☐ Taxable Income Amount
- ☐ Paycheck Stub, Showing Deductions from Gross Income (You and Your Spouse)
- ☐ Investment accounts: we need a basic overview of accounts held, type ie IRA, brokerage etc, and apx amount in each
- ☐ Cash/checking/savings/cd account balances
- ☐ TSP amount and allocations
- ☐ Pension estimates, if applicable
- ☐ Annuity statements
- ☐ Life/Long-term care/Disability insurance policy information
- ☐ Home values and information on any real estate holdings
- ☐ Mortgage information
- ☐ Child costs if applicable & any 529/college saving plan balances and contributions
- ☐ Social Security statements