

Introductory Meeting

Documents and statements to bring with you to our first meeting

Banking

- Checking
- Savings
- CD

Investment

- Brokerage
- Mutual Fund

Retirement Savings

- IRA
- 401k
- 403b
- Profit Sharing
- Annuity Contracts

Retirement Income Benefits

- Social security
- Pension

Education savings

- Coverdell Education Savings Account
- 529

Tax

- Prior Year Tax Return

Debt

- Mortgage
- Home Equity
- Credit Cards
- Auto Loans
- Student Loans

Insurance

- Life
- Health
- Medicare Coverage
- Disability

Estate

- Will
- Power of Attorney
- Health Care Directive
- Trust