

## USEFUL DOCUMENTS TO BRING TO YOUR FINANCIAL PLANNING MEETING:

- Two Most Recent Pay Stubs
  - Monthly Household Expenses
  - Annual Income / Commission Figures
  - Employee Benefits Handbook
  - Personal Financial Statements
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- Current Loans (Original, Current, Interest Rate, Term)
    - Mortgage
    - Business
    - Auto, etc.
  
  - Bank Statements
    - Savings Accounts
    - Checking Accounts
    - Money Market Accounts
    - Certificate of Deposit Accounts (CD's)
  
  - Investment Statements
    - Stock Accounts
      - Brokerage Accounts
      - Stock Option Plan
      - Stock Purchase Plan
    - Bond Accounts
    - Mutual Fund Accounts
    - College Funding Accounts
    - Most Recent Trust Statements

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Continued...

- Life/Disability/Medical/Umbrella Insurance Policies
  - Life/Disability
  - Current Cash Value Statements
  - Most Recent Annual Statement
  
- Retirement Statements
  - IRA's (Traditional or Roth)
  - Employer Sponsored Plans (401(k), 403(b)(c), etc.)
  - Profit Sharing
  - Pension Plan
  
- Miscellaneous
  - Last Year's Tax Return
  - Copies of Legal Documents
    - Wills, Trusts, Buy-Sell, Prenuptial, etc.

It is not necessary to gather all of the listed information. However, individuals find that it is a great opportunity to review their current positions, and it also gives me a chance to examine your situation in greater detail. If you have any questions in the meantime, please feel free to contact me at 425-214-0432.

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