



## WHAT TO BRING TO OUR FIRST MEETING:

<input type="checkbox"/> List of debts, including the following:	Rate	Balance	Monthly Payment
<input type="checkbox"/> Mortgages	_____ %	\$ _____	\$ _____
<input type="checkbox"/> Home Equity Loans or Lines of Credit	_____ %	\$ _____	\$ _____
<input type="checkbox"/> Credit Cards	_____ %	\$ _____	\$ _____
	_____ %	\$ _____	\$ _____
	_____ %	\$ _____	\$ _____
<input type="checkbox"/> Student Loans	_____ %	\$ _____	\$ _____
<input type="checkbox"/> Car Loans	_____ %	\$ _____	\$ _____
	_____ %	\$ _____	\$ _____

**Most recent copies of investment statements:**

- Checking
- Savings
- CDs
- Money Markets
- Stocks, Bonds, Limited Partnerships and REITs
- IRAs
- Annuities
- 401(k) and Other Retirement Plans
  - Retirement Plan Investment Options

**Most recent copies of the following insurance documents:**

- Life Insurance Policies
- Disability Insurance Policies
- Long-term Care Policies
- Latest Declarations Page of Auto and Homeowners Insurance

**Other important information and documents:**

- Monthly Budget Sheet
- Pay Stubs
- Social Security Benefits
- Most Recent Tax Return
- Copies of Wills and Trusts