

What Financial Documents are the Most Useful to Bring to Our First Meeting?

At our initial meeting, it would be most efficient if you would please bring with you the following financial information about you and your spouse (or, as much as is possible):

- At least 3 years of prior federal & state income tax returns
- Year-end pay stubs, current pay stubs, statement of employee benefits and deferred compensation benefits as of year-end
- All bank, brokerage, savings & other investments account statements
- Recent valuations for your financial assets: house, real estate, collectibles, inheritances, etc.
- Retirement, pension, profit sharing, IRAs, etc. account statements
- Insurances: life, disability, health, auto, long-term care, umbrella policies, etc.
- List of outstanding debts: mortgage, home equity line, credit cards, bank loans, student loans, loans against retirement plans, personal loans to business (if owned), etc.
- List of trusts, gifts, future inheritances, children's accounts and trusts, etc.
- List of business accounts (if owner of business) and business financial records, credit cards, registers, 3 years of tax returns, etc.
- Your estimated budget and / or cash flow statement
- A copy of your financial affidavit (and his) if completed or drafted
- A list of your financial priorities and concerns
- Any other information you think is important