



APPOINTMENT CHECKLIST

15 DOCUMENTS TO CONSIDER BRINGING ALONG

To help prepare for your meeting, we've created a checklist of documents to consider bringing with you. Skip over the ones that don't apply to your situation. If in doubt over a particular item, bring it along and we'll help you sort it out.

- **Investment Account Statements**
- **Retirement Account Statements including 401(k) and 403(b) accounts**
- **Pension Estimates**
- **Annuity Statements**
- **Life/Long-term Care/Disability Insurance Policy Information**
- **Home Values and Information on any Real Estate Holdings**
- **Mortgage Information**
- **Student Loan Statements**
- **Value/Appraisal of Significant Personal Property like boats, automobiles or jewelry**
- **Business Valuations (if you own a business)**
- **Stock Option Plans**
- **Social Security Statements**
- **Tax Returns (if available)**
- **Trust(s) Documents (if available)**