

Financial Planning Process

Helpful items to bring to the first meeting

The more detailed information you wish to provide, the more detailed your plan will be. Please keep in mind that we do not want to overwhelm you in this process. We may use general estimates to provide you with a less detailed, bottom line financial plan. The most important thing is for us to provide you with some useful planning ideas to assist you in meeting your financial goals.

- **Latest investment statements from investment companies, banks, trust companies, etc..**
- **Pension / 403(b)-TSA statements from employer(s).**
- **Life insurance (latest statement) and disability insurance policies (actual policy & latest statement).**
- **Budget - personal and living expenses.**
- **Information on mortgage and other loan statements.**
- **Latest wills, trusts and powers of attorney.**
- **2 Year of Income Tax Returns (latest).**
- **Real Estate Property details (rentals, farmland, etc).**
- **Employment Contract**
- **Most Recent Pay Stub**
- **Copy of latest Flex Allocation Form**
- **Other relevant financial information.**