



Please try and gather as much information as you can, if you can only get account balances for the 1st meeting that is okay however statements are preferable.

INCOME & EXPENSES

- Expense Worksheet (See Attached)
- Pay Stubs

STATEMENTS

- Bank Statement(s)
- Mortgage Statement(s)
- Retirement Account Statement(s)
- Investment Statement(s)
- Social Security Income Statement(s) www.ssa.gov

BENEFITS

- Pension Benefit Election Options
- Stock Option(s)
- Employee Benefits
- Deferred Compensation Plan(s)

INSURANCE

- Auto and Homeowners Declaration Page
- Life, Disability, Long Term Care Insurance Policies

MISCELLANEOUS

- Will(s), Trust(s), Power(s) of Attorney
- Business Agreement(s)