MATERIALS TO BRING TO YOUR FIRST MEETING

Financial planning advice is most effective when your advisor has a good understanding of your personal goals and objectives, fears and concerns, and dreams and aspirations. It's equally as important that we understand your complete financial picture—not just a part of your financial affairs. With that in mind, please bring the following documents, as applicable, to your first meeting with us, so we can take a detailed look at your personal assets, investments, pensions, and real estate.

- [ ] Names and contact information of individuals who provide you with financial advice (attorney, accountant, banker, insurance agent, etc.)
- [ ] Rough outline of your monthly expenses (expense worksheet)
- [ ] Copy of your pay stub
- [ ] Employment benefits description
- [ ] Most recent IRS tax return
- [ ] Most recent 401(k) statement and supporting plan documents
- [ ] Pension plan information
- [ ] Recent statement of all open credit card accounts
- [ ] Most recent bank statements
- [ ] Stock certificates
- [ ] Brokerage account statements
- [ ] IRA statements
- [ ] Home/renter's/auto insurance policies
- [ ] Life insurance policies and most current annual statement
- [ ] Long-Term care policies
- [ ] Copy of your will/trust
- [ ] Contact information for the spouse or partner, if any, with whom you will be making financial decisions

THE WEALTH TRANSITION
COLLECTIVE

140 Main Street | Suite 400 | Northampton, MA 01060 | 413.584.1805 | 413.584.1854 fax | www.twealthtc.com

AMKTG-3951-42668_06/19