

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

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