

## Initial Meeting Checklist:

Please bring the following items to your first meeting.

### *If you are currently working:*

- Most recent tax return
- Current investment statements
- Retirement plan statements from prior employers
- Current employer retirement plan statement
- Pension plans and income projections
- In-force insurance policies (including long-term care) and annuity contracts (most recent statements)
- Trust documents/Power of Attorney
- Debt Information: balances and interest rates
- Social Security estimated benefits report
- Percentage or amount you are contributing to your employer retirement plan \$/% \_\_\_\_\_
- Percentage your employer is matching \$/% \_\_\_\_\_
- Annual income \$ \_\_\_\_\_
- Monthly net/take-home income \$ \_\_\_\_\_
- Monthly mortgage/rent \$ \_\_\_\_\_
- Monthly expenses less mortgage/rent \$ \_\_\_\_\_  
*(Please be sure to include all living expenses and miscellaneous expenses)*
- Annual/irregular expenses \$ \_\_\_\_\_  
*(Please be sure to include all taxes, vacations, and insurance)*
- Estimated target income for retirement (in today's dollars) \$ \_\_\_\_\_
- CPA/Tax Preparer: \_\_\_\_\_

### *If you are currently retired:*

- Most recent tax return
- Current investment statements
- Retirement plan statements from previous employers
- In-force insurance policies (including long-term care) and annuity contracts (most recent statements)
- Trust documents/Power of Attorney
- Debt information: balances and interest rates
- Social Security benefit amount \$ \_\_\_\_\_
- Total monthly income \$ \_\_\_\_\_
- Monthly mortgage/rent \$ \_\_\_\_\_
- Monthly budget \$ \_\_\_\_\_  
*(Please be sure to include all living expenses and miscellaneous expenses)*
- Annual/irregular expenses \$ \_\_\_\_\_  
*(Please be sure to include all taxes, vacations, and insurance)*
- CPA/Tax Preparer: \_\_\_\_\_

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