New Client Checklist

Please bring the following items to our first meeting, if available:

- ☐ Most recent paystubs.
- ☐ Most recent federal and state income tax returns.
- ☐ Pension statements and/or booklets with your pension formula.
- ☐ Most recent Social Security benefit statements.
- ☐ Values of titled personal assets.
- ☐ Most recent investment statements, including 401(k), 403(b), IRA, traditional brokerage.
- ☐ Annuity statements.
- ☐ Our personal and financial data form, also included on our website. Please complete this if possible. Otherwise, we will gather this information during our first meeting.

We look forward to meeting with you!

Please call our office at 800-487-1786 if you should have any questions.

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