INITIAL MEETING ITEMS

- Individual and Business Information - DOB, entity type, SSN or EIN
- Property - real estate, vehicles, business, other assets and how titled
- Bank Statements - checking, savings, CDs
- Loan Information – mortgages, lines of credit, student loans, credit cards, car loans
- Business and Investment Contracts - buy/sell agreements, etc.
- Investment Statements - brokerage accounts, mutual funds, retirement accounts, 529s
- Insurance Policy Summary Pages - life, health, annuity, long term care, disability, business
- Income Information – W-2s, 1099s, pay stubs, Social Security statements, pension statements
- Monthly Living Expenses – QuickBooks download, EXCEL spreadsheet, credit card annual summary, list on paper
- Recent Tax Returns - personal and business
- Estate Documents - Wills, POAs, Healthcare Directives, Trusts