

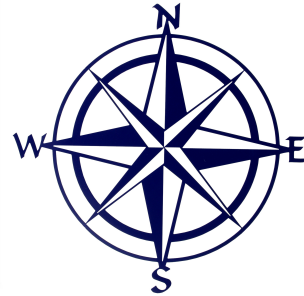
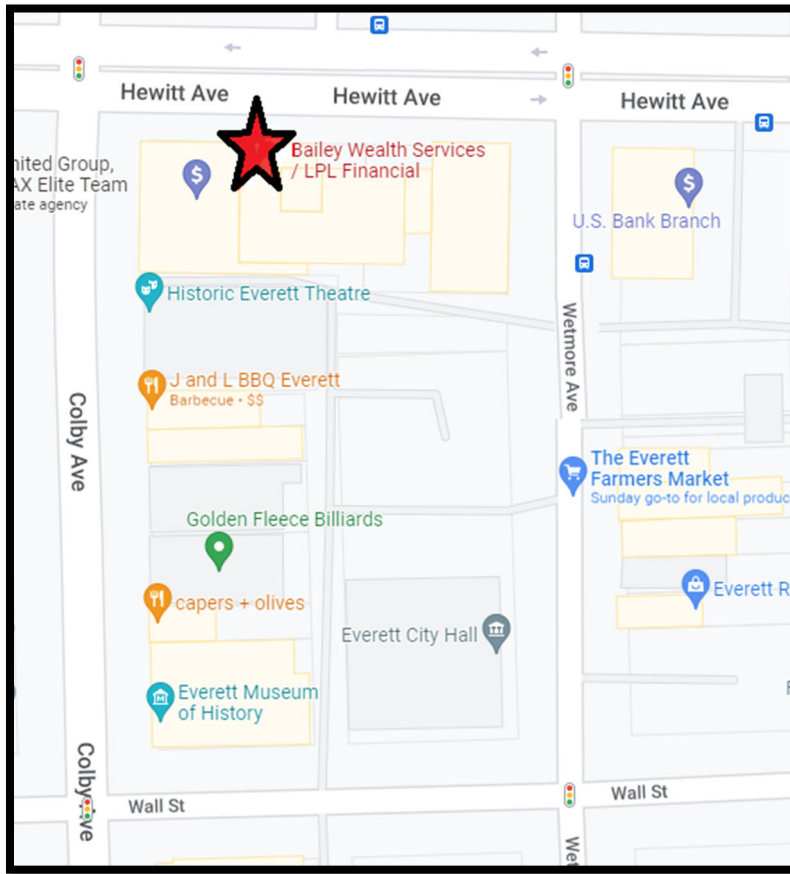


Documents and Information to bring to your meeting

- Income Information (Earned Income, Investment Income, Social Security, Pension, Other)
- Pay Stubs
- Tax Returns
- Balance sheet information. Bring Statements for all Financial Assets
 - Bank Accounts
 - Securities
 - Business Value and Entity Type
 - Retirement Accounts
 - Credit Card Balances
 - Property Valuations
 - Mortgage(s)
 - Personal Loan(s)
- Expenses (Fixed, Variable)
- Insurance Coverage
 - Life
 - Disability
 - Long-Term-Care
 - Property and Casualty
 - Other
- Wills/Trusts
- Existing Professional Relationships (Advisors, CPAs, Attorneys, Insurance Agents, etc.)

Please gather what you can, and we can work around any missing items.

MAP & PARKING INSTRUCTIONS FOR OUR OFFICE



1604 Hewitt Ave., Suite 704, Everett, WA 98201

For your convenience you can use the building's underground parking garage. The entrance is located on Wetmore Street. Upon approaching the Bank of America teller windows, you will see the parking garage entrance on the right. Park in one of the numbered hourly spaces and provide us with the number of the parking space and your license plate number to validate your parking when you arrive.