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

BDS
FINANCIAL NETWORK

BDS Financial Network – Solon Office
30405 Solon Road | Suite 16 | Solon, OH 44139
440.248.5625 | 440.498.7498 fax | bdsfn.com

BDS Financial Network – Medina Office
3716 Forest Ridge Circle | Medina, OH 44256
234.217.0318 | 234.281.0208 fax | bdsfn.com