



Private Wealth  
Management

# Financial Plan Meeting Preparation

Our Financial Planning process consists of two meetings: Vision and Presentation.

During our Vision Meeting, we will spend time getting to know you and understanding your situation. Then, our team will develop customized recommendations. Lastly, we will get back together to review these recommendations and implement action items.

Prior to our meeting, please gather the following items and bring them with you.

## Things to Bring with You:

- Pay Stubs
- Federal Tax Return
- Statements of Investable Assets  
*401(k)s, IRAs, brokerage accounts, 529 plans, savings accounts, etc.*
- Statements of Liabilities  
*Statements showing balance, interest rate, maturity, & monthly payment*
- Insurance Policies  
*Life, long-term care, and disability*
- Social Security Statement



The Oldham White Monroe Group

707 Vail Street  
Princeton, IN 47670  
812-385-3323