

What to Provide Before Your First Meeting

To help make our upcoming meeting more worthwhile, please provide the following information beforehand. You can drop it off at the office, mail it to our address, or fax the information to us. **If you prefer to scan and send via e-mail, please call the office first and we will arrange for the e-mail to be encrypted.**

Information to send us ahead of time:

Tax and Payroll Information

- Copy of last year's tax return (if your taxes are not prepared by Niehaus Tax Services)
- Copy of recent paystub

Bank Statements & Credit Card Balances

- Bank statements showing balances & interest rates of checking, savings, and CDs (also maturity dates)
- Credit card balances and applicable interest rates

Benefit Statements

- Social security benefit statement (now available online www.ssa.gov or call 1-800-772-1213).
- Pension benefit statement

Investment Information

- Amount that is being saved on a systematic basis (for example, monthly contributions to your employer's 401k), as well as any matching/profit sharing contributions provided by your employer
- Statements from investment accounts, including the names of funds or other securities, with recent values
- For non-retirement accounts, please provide tax cost basis (initial purchase amount, plus any reinvested distributions)
- For accounts with beneficiaries, please list who is primary and who is contingent

House & Car Information

- Approximate value of real estate, type of ownership (individual, joint, trust, etc.)
- Mortgage information (fixed or adjustable, balance remaining, interest rate)
- Car loan information (balance remaining, interest rate)

Insurance Information

- Statements from life insurance policies detailing type (term, universal, whole, variable), death benefit, cash value
- Other insurance information, including disability, auto, and liability