Here's a handy checklist on what to gather for your first meeting. Bring only the items you wish to discuss and that you have available.

Assets

- ☐ Bank account statements
- ☐ Savings account statements
- ☐ 401k/403b statement (both current and from previous employers)
- ☐ IRA (Roth, Traditional or Rollover) statement
- ☐ Investment account statement
- ☐ Annuity statement

  * Investment statements should include holding details

Debt

- ☐ Mortgage statement
- ☐ Home equity statement
- ☐ General understanding of other outstanding debts

Income

- ☐ Most recent federal and state tax returns, all schedules
- ☐ Social Security Administration Estimate of Benefits form
- ☐ Statement of estimated pension benefits

Estate

- ☐ Trust Documents
- ☐ Life insurance policy
- ☐ Long term care insurance policy