To help us better get to know you, it is helpful if you bring along some of the following (if applicable):

1. Your approximate annual income

2. Any pension estimates you may have

3. Statements for your 401k,457b,403b, or any employer related plan you may have

4. Statements for investment accounts, including trusts, IRA, ROTH IRA, College Savings, and general savings

5. Liabilities you have, including home mortgages, car payments, credit cards, student loans, loans, etc.

6. A general idea of what you are spending on a monthly basis (this is always a tough one but we will help you work through it!)

7. Life insurance, long term care or annuity statements

This will give us a good start as to where you stand today and how we can work together to help you achieve your future goals and dreams. We look forward to meeting with you soon!