



To help us focus our advice on your personal needs, please bring the following information to our meeting:

- Last year's tax return.
- Your will and other estate planning documents.
- A recent pay stub.
- Balance sheet information (You can use our attached "Balance Sheet Template" as a guide or bring the requested information in any format that is convenient and makes sense to you).
 - Details of your home (value, amount of mortgage, mortgage payment)
 - Recent statements from retirement accounts (IRAs, 401(k)s, TSPs)
 - Information on other major assets.
 - Details of any debts – amount outstanding, interest rate and payment.
 - Highlights of any health, disability and life insurance policies.
- A list of questions that you would like us to address.
- Any other information that you would like us to consider.

Be sure to call if you have any questions during the "data gathering" stage. If you have trouble finding any of the information or are uncertain about the level of detail feel free to leave it out and proceed with your meeting as scheduled. We look forward to meeting with you.