



What to Bring

We are often asked the question "What should I bring to my initial session?" The answer depends on the specific questions or issues you would like to address. The list below is representative of the documents we typically review when employed to create a custom financial plan.

Please note that while all of these are helpful documents, they are not required for our initial session. The most important first step is getting to know you, your family's vision for the future and identifying your concerns.

INVESTMENT

- Funds, Annuities, Brokerage and Bank Statements
- 401(k) / 403(b) Statements

FINANCIAL PLANNING

- Employee Pension or Profit-Sharing Statements
- Insurance Policy Statements (Life, Long Term Care)
- Mortgage Statements with Payoff and Interest Information
- Social Security Benefit Statements
- Other Statements of Assets or Liabilities
- Income Tax Returns (Previous Year)
- Recent Pay Stub(s) or W-2(s)

ESTATE

- Copies of Trust Agreements (If Applicable)
- Copies of Wills, Power of Attorneys and Medical Power of Attorneys

Please call us at 513-733-1750 if you have any questions regarding these documents.

