Initial Meeting Checklist

- Statements of all investment accounts including stocks, bonds, mutual funds, annuities, and cash accounts
- Recent statement of all retirement accounts including IRAs, 401(k), 403(b), SIMPLE plan, SEP or any other retirement plan
- Life & Disability Insurance info
- Sample monthly budget
- Last year's W-2 or tax returns and a recent pay stub
- Date of Birth
- Social security numbers of any person (or tax payer ID for any entity) that will be named an owner or beneficiary on any accounts
- Driver's license (to comply with the Patriot Act we must provide driver's license information with your application to establish any account)
- Mortgage information including any second mortgage or home equity line of credit details
- Any other items that you feel may be of financial importance