

THINGS TO BRING WITH YOU

NOTE: If any of these is difficult or impossible to get, please come without it. We can get it later.

Personal

- Federal and State Tax returns (1 year OK if representative)
- Investment Policy Statement(s) from your Investment Advisor; and when were they last reviewed?
- Current statements for all Investments (incl. Bank, IRAs, 401ks, etc.)
- Current information on all Real Estate owned, incl. Mortgage balances, etc.
- All Insurance policies (including homeowners, auto, etc.)
- Detailed Employee Benefits information, esp. regarding life & disability insurance, flexible spending 401k or 403b (incl. investment choices), pension or profit-sharing plan
- Wills and Trusts
- Pay Stubs (latest)
- Full information about all your Debts
- Any other items of financial importance

Business

- Financial Statements
- Business Plan, if available
- Relevant Agreements: Buy-Sell; Key Person employment; etc.
- Information about Employee Benefits; and also about Discriminatory Benefits to owners, key employees, etc.
- Property & liability insurance