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# Meeting Checklist

In order to more fully understand your financial situation, it is important for the Wealth Planner to be able to see and evaluate the following forms, reports, and statements. Please bring the following (if applicable) items to your meeting. If you choose to leave copies with your Wealth Planner, they will become part of your confidential client file and will not be shared with anyone other than necessary KBWPG staff members.

## Employment

- Most recent statement from your employer's 401(k), 403(b), 457, or Stock Option plan.
- Most recent statement regarding your employer's pension plan
- If you are self employed, most recent statement of your Solo-401(k), or SEP-IRA plan

## Investments

- Latest statements for IRA and non-IRA investment accounts
- Latest statements from fixed or variable annuity accounts
- Latest statements from Trust income accounts

## Banking

- Latest bank statements from all banking relationships
- Statements regarding CDs or Money Market accounts

## Government

- Latest Social Security Estimated Benefit Statement
- Latest statement regarding government pension

## Current Income

- Most recent two employment pay stubs
- Last two year's tax returns

## Other

- Living Trust portfolio
- List of beneficiaries, with dates of birth and Social Security numbers
- Current life insurance policies