

AO

WEALTH
ADVISORY

First Visit Checklist, Getting Organized

WHAT TO EXPECT IN OUR MEETING



Urbandale, Iowa

515-224-7849

Gathering key financial information in advance helps your advisor understand your current situation and plan towards financial goals.

We realize that like most people, your financial life probably isn't in perfect order already. Statements end up buried in drawers and at the bottom of piles. Insurance policies are buried who-knows-where. Sometimes we even lose track of old accounts. We want to maximize our time together, and while you may not have every portion documented, as Certified Financial Planners®, we are here to make an impact from our first conversation.

WHAT TO BRING TO OUR MEETING

YOUR QUESTIONS

This is your opportunity to find out about the feasibility of all of the things you've been thinking about for your finances and your life goals. Make a list!

FINANCIAL STATEMENTS

Provide copies of your financial statements—including those from your banks, brokerage firms and retirement account custodians—and your tax documents.

INCOME AND EXPENSES

Be prepared to talk about your income, regular expenses and monthly cash flow.

DEBT

Provide a summary of your debt—including your mortgage, credit cards, student loans, car loans and other debt—and the interest rates and terms on the loans.

INSURANCE

Provide your insurance and estate-planning documents. Prepare to talk about your financial risks and how they are or aren't currently covered.

GOALS

Start thinking about your short-term and long-term goals. Together we'll help you prioritize and plan.

CHECK-LIST

Gather what you can, and we'll help work through the rest!

- Bank Statements
- Tax Documents (W2s, etc)
- Pay Stubs
- Brokerage Firms
- Insurance Documents
- Statement of Debts
- Monthly Expenses (Budget)