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**WHAT TO BRING TO THE FIRST MEETING**

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For your initial appointment, please provide as many pieces of information from the following list as possible. This will assist us in creating a complete picture of your financial situation.

* Last tax return
* Financial statements including 401K, brokerage accounts, IRA, Roth and Mutual funds
* Insurance policies and Annuities
* Employee benefits including stock options and profit sharing
* Copies of will and/or trust documents
* Debt balances and interest rates owed