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WHAT TO BRING TO THE FIRST MEETING

Pursuit Wealth Strategies
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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