FAMILY WEALTH
SOLUTIONS
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Initial Meeting Checklist

Please bring as many of these items as you can to our first meeting:

- A copy of your most recent tax return
- Current statements for bank or retirement accounts and any other investments
- Current personal balance sheet, showing all personal assets and liabilities
- Your personal budget
- Any life insurance and/or long-term care policies
- Property and casualty insurance summary for your personal assets
- Copies of your will and other estate planning documents
- Most importantly, your short-, medium-, and long-term financial and personal goals and any concerns

If necessary, after our initial meeting, we would be happy to make copies of any pertinent documents.

If you have any questions before the meeting, please do not hesitate to contact us.

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