255 Village Parkway NE
Suite 210
Marietta, GA 30067

Phone: (678) 905-3292
Fax: (866) 685-3839
Email: mail@wcplanning.com

What to Bring to Your First Meeting

The more we know about your financial picture the better we can advise you. To get the most out of your first meeting, bring your current information and paperwork. The following is a list of important documents to include:

Financial Documents

- Bank & savings account statements
- Investment account statements
- Credit card balances with interest rates
- List of stocks held outside of brokerage accounts
- Details of partnerships interest

Retirement Planning Documents

- Recent IRA, ROTH IRA, 401(k), 403(b) statements
- Social Security Statement
- Employee benefits program description
- Deferred compensation and stock option agreements
- Pension and profit sharing statements

Property Owned

- Description and value of primary residence and other real estate
- Mortgage balance and/or loan payment information including monthly payment, interest rate, years left to maturity

Asset Protection Documents

- Life insurance details including, name of insured, death benefit, type of policy, cash value
- Summary of medical, homeowners and auto insurance policies
- Summary of disability, umbrella and long-term care insurance policies
- Annuity policies and statements

Estate Planning Documents

- Copy of your Will
- Durable powers of attorney and health care powers

Tax Planning Documents

- Tax return for previous year
- W-2s from previous year and a recent pay stub
- Estimated required tax payments for current year