



Your Goals. Our Focus.

Materials to Bring to Your First Meeting

Financial planning advice is best given when the advisor has a good understanding of your personal goals and objectives, fears and concerns, dreams and aspirations. Therefore, it is imperative to your future financial success that we are able to obtain your complete financial information — not just a part of your financial affairs. We request that you provide full details on personal assets, investments, pensions, and real estate. Below is a list of the documents and information we request that you bring to your first advisor meeting.

- The names and contact information of individuals who provide you with advice related to your finances (Attorney, Accountant, Banker, Insurance Agent, Etc.)
- A rough outline of your monthly expenses (expense worksheet)
- Copy of your pay stub
- Employment benefits description
- Most recent IRS tax return
- Most recent 401(k) statement
- 401(k) choices/selections
- Pension information
- Recent statement of all open credit card accounts
- CD maturity dates
- Money market statements
- Currently held stocks and number of shares
- Brokerage account statements
- Face amount of series E, EE, and HH bonds
- IRA statements
- Latest declarations page from auto, home/renter's, disability insurance
- Life insurance policies and most current annual statement
- Long term care policies
- A copy of your will/trust
- Your spouse or any other person with whom you will be making financial decisions

CONNECT

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