



# 1ST MEETING HELPFUL CHECKLIST

Please note: If you are married, assets such as your home and cars will be titled in joint ownership in most, but not in all cases. In addition, certain assets such as a checking/savings account may actually be listed under just one name rather than being titled as joint accounts. Retirement assets such as IRAs, 403(b), 401(k) and other employer retirement plans are titled by law solely in the name of the employee, with either the spouse or another individual as the beneficiary.

## ASSETS

- Residence (Current Market Value)
- Auto(s)
- Boat, Airplane
- Rental Property
- Checking Account(s)
- Savings Account(s)
- Bond(s), CD(s)
- Investment(s)
- Retirement Plan(s)
- Jewelry, Art, Collectibles
- Business Property

## LIABILITIES

- Mortgage(s)
- Credit Card(s)
- Loan(s)
- Automobile
- Boat, Airplane
- Business Liabilities

## DOCUMENTS

- Tax Returns (Last Two Years)
- Life Insurance Policies
- Disability Income Insurance Policies
- Long Term Care Insurance Policies
- Social Security Statements
- Trust Documents
- Will

