WHAT SHOULD I BRING TO OUR FIRST MEETING?

- ☐ List of financial goals/concerns
- ☐ Recent investment statements
- ☐ Value of cash reserve accounts (i.e., savings account, credit union, money market, life insurance account)
- ☐ Ideas to develop your cash flow projections/net worth statement
- ☐ Expected large expenditures within the next 6 months to 1 year

Additional information helpful in the financial planning process:

- ☐ Copies of wills and/or trusts
- ☐ Recent paycheck
- ☐ Copy of recent tax return
- ☐ Income and/or expense information for side businesses
- ☐ Benefit statements from employer(s) (i.e., pension documents, profit sharing, 401k statements, etc.)
- ☐ Life insurance policies
- ☐ List of owed debts or debts owed to you

Please do not hesitate to call us with any questions.

2138 Saint Albans Street
Philadelphia, PA 19146
O 215.515.3953 • **F** 215.220.2672
www.kauferfinancial.com