AMES PLANNING ASSOCIATES, INC.
A FINANCIAL LIFE PLANNING FIRM

Initial Meeting Document List

In order for us to make our first meeting together the most fruitful, we have listed a number of documents that we would like to review to best assess your current and future financial situation.

1. Last 2 years' tax returns.

2. Your most recent pay stub (and for spouse if appropriate).

3. Recent copies of investment account statements.

4. Recent copies of retirement plan statements (pension plans, deferred compensation plans, profit sharing plans, 401(k) plans, TSAs, Keoghs, IRAs, annuities, etc.).

5. Estimate of real estate values and other personal possessions.

6. List of current liabilities (mortgages, credit cards, auto loans, home equity lines of credit) as well as rates of interest charged by loan companies.

7. Summary of your life insurance policies.

8. Copies of your wills, trusts, durable powers of attorney, living wills, etc.

9. Prenuptial agreements and divorce papers, if applicable.

10. Recent Social Security Statements that estimate your projected future benefits.

11. Any other important documents that you feel might be necessary to complete your financial picture.

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