VIATOR
WEALTH MANAGEMENT GROUP of NEST CAPITAL

Financial Advisor Meeting Checklist

DOCUMENTS TO CONSIDER BRINGING ALONG

To help prepare for your meeting, we've created a checklist of documents to consider bringing with you. Skip over ones that don't apply to your situation. If in doubt over a particular item, bring it along, and we'll help you sort it out.

- ○ Drivers License
- ○ Investment account statements
- ○ Retirement account statements including 401(k) and 403(b) accounts
- ○ Pension estimates
- ○ Annuity statements
- ○ Life/Long-term Care/Disability insurance policy information
- ○ Home values and information on any real estate holdings
- ○ Mortgage information
- ○ Student loan statements
- ○ Value/appraisal of significant personal property like boats and vehicles
- ○ Business valuations (if you own your own business)
- ○ Stock option plans
- ○ Social security statements
- ○ Information for beneficiary updates or changes: Beneficiary's full name, address, phone number and date of birth.
- ○ Most recent tax return/tax documents

Bonus:

Consider these two items prior to the meeting with an advisor. Writing out and sharing your thoughts would be helpful.

- ○ How would you describe your risk tolerance as it relates to investing?
- ○ What do you want to achieve with your financial assets?

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