PARTNERS
WEALTH MANAGEMENT

Getting Started: Requested Information

In order for us to assist you in your planning and to utilize everyone's time efficiently, we ask that you pull together the following documents:

- Bank statements
- IRA, Keogh, and 401(k) statements
- Other investment instruments
- Summary of benefits provided through employers
- Stock Option information (NQ/ISO/ESPP) plan documents, exercising agreements, statements and summary of activity
- Legal documents (trusts, buy/sell agreements, wills, etc.)
- Insurance contracts (life, disability, long-term care, home/auto)
- Tax returns from the last two years
- Any other information that you feel is relevant to your finances

Also, in order to better understand your financial independence needs, it would be helpful if you could give some thought to your regular lifestyle costs as well as any big-ticket purchases (i.e. college tuition, second home, etc.) you anticipate in the next few years.