



What to Bring Checklist

The following documents are needed and should be brought with you on your initial appointment:

- Completed *Wealth 360*° Personal Profile –
 - Available on [WilliamsWealth360.com/Prospective Clients](http://WilliamsWealth360.com/ProspectiveClients)
- Investment statements – Including current and previous employers
 - IRA's, 401k's, 403b's, 457 plans
 - Stocks, Bonds
 - Mutual funds, Exchange Traded Funds
- Bank statements –
 - Checking, Savings
 - Money Market, CD's
- Copy of your recent mortgage statement showing payment, interest rate and balanced owed.
- Copies of any insurance policies
 - Life
 - Disability
 - Long Term Care
- Information pertaining to benefits provided to you through your employer covering life, disability and long term care insurance.
- Estate Documents (Will, Trust, etc.)
- Tax returns for the last two years
- A list of questions you would like answered

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