CREATIVE PLANNING®

PRIVATE WEALTH MANAGEMENT

First Meeting Checklist

Please bring the items listed below to your initial financial planning meeting with Creative Planning. We will be consolidating and organizing your financial information in a simplified binder, **which you will take with you after the meeting.**

- [ ] **Most recent** monthly or quarterly investment account statements, including retirement plan statements and 529 accounts
- [ ] **Original** life, annuity, disability and long-term care policies
- [ ] **Original** home, flood, auto and umbrella insurance policies
- [ ] Last year's tax return
- [ ] **Original** legal documents, including trusts, wills, healthcare power of attorney, financial power of attorney, irrevocable trusts, etc.
- [ ] **Most recent** health insurance summary of benefits documents and 404(a)(5) retirement plan fee disclosures (note: the latter is provided annually by your employer and can be accessed via your plan login)
- [ ] Social Security statements (note: the Social Security Administration no longer mails these statements to workers under age 60, so download your statement at http://ssa.gov/myaccount/)
- [ ] Social Security cards, birth certificates, passports, titles, deeds and marriage license (note: these simply go in an organizer that stays with you — if preferred, you may add these to your organizer later)

Thank you — we look forward to seeing you!