FIRST MEETING

Get Started Checklist

Prepare yourself for your first meeting. Before our first meeting, review the checklist below and get ready to see your financial world come to life!

1. PAPER STATEMENTS FOR OFFLINE ACCOUNTS

- ☐ Investment statements with holdings
- ☐ Banking account balances
- ☐ Credit card and loan statements
- ☐ Mortgage balances and payment terms

2. CREDENTIALS FOR ONLINE ACCOUNTS

- ☐ Know what URL you use to log in to each website
- ☐ Gather your usernames, passwords, and answers to security questions (if applicable)

3. IMPORTANT DOCUMENTS/FILES TO BE UPLOADED TO THE VAULT

- ☐ Insurance policies, deeds and wills
- ☐ Medical records, list of medications, pharmacy contact information and allergy information
- ☐ Photos, passports and driver licenses
- ☐ See the “Vault Checklist” document for more ideas

4. MOBILE DEVICES—WHERE WOULD YOU LIKE TO ACCESS YOUR PORTAL?

- ☐ Smart phones
- ☐ Tablets
- ☐ Laptop

5. LIST OF CONTACTS

- ☐ Contact information for your CPA, attorneys, doctors, etc.
- ☐ Family information, addresses, and birthdates