

# The Confidential Financial Interview ➤

## Please read before you begin...

Thank you for providing us the opportunity to assist you in this important planning process. The confidential financial interview is the first step in providing you with a personal financial analysis. This process will assist us in obtaining an understanding of your current financial position as well as point us in the appropriate direction to address your specific goals.

## Documents to bring to our next meeting

During our next meeting, we will discuss in great detail your personal and financial goals and objectives. You will need to allocate two hours for this meeting.

We will be able to work to your best advantage when you provide supporting documents. You may be sure that your documents will be professionally safeguarded under strict, confidential control during the analysis period. Your documents will be returned to you in the same condition as when provided. Duplicate copies of your financial papers are acceptable.

Please place the documents in the accompanying organizer and bring it with you to our next meeting. If you have additional documents, not listed here, that you believe may be important, include them as well.

If you have any questions while gathering these documents, please call our office at (843) 821-3009 or email us at [info@assetintegration.com](mailto:info@assetintegration.com).

## Checklist of Needed Documents

### Income

- Income tax returns last two years
- Paycheck stub(s)  
with deductions and gross income
- Most recent Social Security statement(s)
- Printout of specific coverage of  
company-provided group benefits.
- Cash Flow Statement (Attached)

### Protection

- Wills & Trust documents
- All Insurance Policies
  - Automobile Policies
  - Homeowner Policies
  - Life Insurance Policies
  - Health Insurance Policies
- \*include all family members
- \*include policy declarations pages

### Savings

- Most recent account statements
  - Bank savings
  - CD's
  - Mortgages

### Growth

- Most recent account statements
  - Investments
  - 401(k), Pensions, Employer plans
  - IRA's, Roth IRA's, Annuities