



What to Bring to Your First Meeting

To make your appointment as productive as possible please bring the following items with you:

- A driver's license, passport or other government-issued photo ID (The U.S. Patriot Act requires us to verify the identity of all clients.)

Recent statements for all financial accounts:

- Checking & Savings Accounts
- CDs
- Money Market Funds
- Mutual Funds
- Tax-Deferred Annuities
- IRAs and other retirement/pension accounts
- Trust or Managed Accounts
- Limited partnerships, UITs or REITs
- Brokerage accounts
- Provide a list of any EE savings bonds or other bonds you have in a safety deposit box or other personal possessions
- Information on real estate, including: current value, type of mortgage, interest rate, remaining balance

Employment information:

- Employer booklets describing employer-provided insurance
- Pension or retirement plans
- Any other employee benefits, such as stock options or deferred compensation plans

Insurance policies:

- Life Insurance
- Disability
- Long-Term Care

Government related:

- A copy of your latest tax return
- A copy of your most recent Social Security Statement, if available
- A list of any other financially-valuable assets not mentioned above

A list of debts, including interest rate and amount owed:

- Credit Cards
- Auto Loans
- Personal Loans
- School Loans
- Other

Be prepared to tell us about your wills and trusts (such as the extent of estate planning you've done, dates created, primary goals)

Please bring the answers to these questions:

1. How much money do you spend each month?



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2. What is your total monthly income? (List sources and amounts)
3. How much money do you contribute to savings or retirement? (List account amounts and frequency)
4. Do you anticipate incurring any major one-time expenses in the foreseeable future? (List items, costs and dates to be incurred)
5. Do you anticipate any major one-time receipts of income? (List amounts, sources and dates expected)

We get it- this sounds like a great deal of work. Although it may be tedious, the more we know about you and your family, the better we can serve you. It is understandable that you may not be able to produce all this information, but please do your best. A few hours of work now could save you hours of headache in the future. Financial planning is a very important process and I strive to make it worth your time.

At Paradigm Wealth Partners, we want to hear about your goals. Not only do we want to be informed about the cut-and-dry items listed above, but we also want you know about your dreams and ambitions for the fun parts of life; whether that be a vacation home, fun trip, or simply leaving behind a legacy for your family. This will give us a better idea of how we can serve you and build a plan that will help you Create the Life You Love®.