BOTKIN FAMILY
WEALTH MANAGEMENT

Items to Bring to Your Initial Meeting

In order for our initial meeting to be as productive as possible, please assemble the following information as it pertains to your situation:

1. Copies of **INVESTMENT** statements from brokerage firms, banks, 401(k)s, etc., including stocks, mutual funds, bonds, annuities and CDS.

2. Current or future **PENSION ESTIMATES** and **SURVIVORSHIP** options.

3. List of all other **ASSETS** (such as your home).

4. List of any outstanding **LIABILITIES**, including your mortgage, and the interest rates associated with each debt.

5. Copies of **INSURANCE** policies or a list of insurance coverage including name of insurance company, face amount, cash value, length of coverage and premium amounts.

6. Copies of your most recent **SOCIAL SECURITY STATEMENTS** or a list of your payment options from social security. You can find this information at www.ssa.gov/estimator.

7. During our meeting, we will discuss your living expenses and the amount of after-tax monthly income you need in order to live a lifestyle comfortable for you. Please provide us with an idea of your **INCOME NEEDS**.

8. If you are not yet retired, please give some thought to your desired retirement date and come prepared to discuss your goals.

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