Meridian Private Wealth Management, Inc.

Envision Profiling Meeting - *"Navigating Your Financial Future"*

Items that you will need to bring with you:

❑ Bank Account Statements
Current checking, savings account statements showing value and positions (CD's, money markets, etc.).

❑ Investment Account Statements (excluding your current accounts with us).
Current brokerage statements showing value and positions (stocks, bonds, mutual funds, CD's, cash, etc.).

❑ Retirement Account Statements and Annual Contribution Amounts
401(k), Pension Account, IRA statements showing values and the amounts annually contributed to them.

❑ Other Assets
Homes, personal property, rental property, collectibles, etc.(we will ask estimated values of these items).

❑ Liabilities
Debts, mortgages, loans, etc.(we will ask estimated amounts of these items).

❑ All Sources of Income
Salaries, pension plans(COLA amount), annuities, trust funds, rental income, etc.

❑ Social Security Information
Current statement mailed to you that shows your estimate of earnings at retirement.

❑ Recent Income Tax filing
We will refer to this during our meeting.

❑ Expenses
An estimate of your monthly living expenses is needed.

A sample of the questions we will ask you:

• *Please prioritize the following goals:*

Early Retirement
Higher Spending
Larger Estate
Reduce Investment Risk
Education Funding
Meet Specific Goal(s)

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