Ramsey & Associates, Inc.
(206) 324~1950
info@RamseyAssoc.com

What to Bring

… TO YOUR FIRST TWO-HOUR MEETING:

1. Most recent Federal Tax Return
2. Estimated value of home
3. Information on liabilities - amount owed and interest rate for each
    a. Mortgages (Need Principal + Interest portion of mortgage payment)
    b. Loans
    c. Credit cards
4. Current pay check stub
5. Total amount you spend each month (average of past 3-4 months) – by category of expense, if possible
6. Recent statements of any investments:
    a. Regular brokerage account statements
    b. Retirement & Pension plans
    c. IRA's
    d. 401(k)'s
    e. Stock options
    f. Monthly retirement benefit estimate (if available from company)
7. Insurance coverage - bring policies if possible or amount of coverage
    a. Life Insurance
    b. Personal Liability (Umbrella) Insurance
8. Information on Inheritances
9. Social Security Benefit Statement
10. Completed Questionnaires
11. Goals and concerns
12. Anything else that would show where you are financially