



**TREY H. WHALLEY, CFA®**  
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## **CHECKLIST FOR MEETING**

Please have these key financial documents ready so we can review them together:

- Investment Statements (401k, 403b, IRA, Brokerage accounts)
- Pension Documents/statements
- Tax Return (most recent)
- Pay Check Stubs
- Social Security Information/statement

Also please be prepared to discuss your long and short term financial goals and concerns. I will also review your current financial picture with you including:

- Assets
- Liabilities
- Income
- Overall lifestyle expense
- How much you save and what into
- Contributions to retirement accounts
- Mortgage payments (if applicable)

During our meeting I will be happy to answer any questions you might have. I look forward to meeting with you soon.

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