J.M. EGAN
WEALTH ADVISORS LLC

First Meeting Check List

Please bring copies of the following documents to our initial meeting. If you do not have all of the documents, please bring whatever documents you do have. If you do not have a copier, please bring your originals and we will copy them for you at our office.

- ☐ Our completed client questionnaire
- ☐ Most recent statements from all financial institutions
- ☐ Most recent statements from all 401(K), IRA, Roth IRA, Retirement Plans
- ☐ All work related benefits (i.e. group life, medical, dental, vision)
- ☐ Current and former employer pension plan information
- ☐ Information regarding monthly income and expenses
- ☐ All stock certificates and statements
- ☐ Savings bonds
- ☐ Existing life insurance policies
- ☐ Long Term Care Policy
- ☐ Deed to all real estate owned
- ☐ Last will
- ☐ Health care proxy
- ☐ Living will
- ☐ Power of attorney
- ☐ Most recent tax return
- ☐ Time share information
- ☐ Information on mortgages , statements, rates of interest
- ☐ Information on any loans receivables or payable
- ☐ Student loan information