

# Get Started Checklist

Prepare yourself for your first meeting. Before our first meeting, review the checklist below and get ready to see your financial world come to life!

### 1. PAPER STATEMENTS FOR OFFLINE ACCOUNTS

- Investment statements with holdings
- Banking account balances
- Credit card and loan statements
- Mortgage balances and payment terms

### 2. CREDENTIALS FOR ONLINE ACCOUNTS

- Know what URL you use to log in to each website
- Gather your usernames, passwords, and answers to security questions (if applicable)

### 3. IMPORTANT DOCUMENTS/FILES TO BE UPLOADED TO THE VAULT

- Insurance policies, deeds and wills
- Medical records, list of medications, pharmacy contact information and allergy information
- Photos, passports and driver licenses
- See the "Vault Checklist" document for more ideas

### 4. MOBILE DEVICES—WHERE WOULD YOU LIKE TO ACCESS YOUR PORTAL?

- Smart phones
- Tablets
- Laptop

### 5. LIST OF CONTACTS

- Contact information for your CPA, attorneys, doctors, etc.
- Family information, addresses, and birthdates

