



## **FBB Capital Partners' Initial Consultation Checklist**

*Please bring the following items to your first meeting:*

- Copies of statements for all brokerage, retirement, and savings accounts
- Social Security and/or other pension benefit statements
- Recent statements related to any outstanding debt (mortgage(s), credit card(s), etc.)
- Copies of recent paystubs
- Copy of your most recent tax return
- Estimate of your current monthly savings and expenses
- Legal Documents (Wills/Trusts/Powers of Attorney)