Things to bring to your first appointment:

- Investment accounts (excluding Wells Fargo Advisors accounts)
  Current statements showing value and positions (stocks, bonds, mutual funds, CD's, money markets, etc.)

- Bank accounts
  Current statements showing value and positions (CD's money markets, etc.)

- A list of your other assets
  Homes, personal property, rental property, collectibles, etc.

- A list of your liabilities
  Debts, mortgages, loans, etc.

- Social Security information
  Statements you may have received with an estimate of earnings at retirement.

- Current contributions
  401k, IRAs, savings accounts, etc.

- All sources of income
  Salaries, pension plans, annuities, trust funds, rental income, etc.

- Copies of your most recent federal and state income-tax returns

- Copies of your wills and trust documents

- Copies of driver's license and social security card

Questions I will ask at your first appointment:

- When do you and your spouse want to retire?

- How much money will you need to live on at retirement? (Monthly Income Goal)

- What are your goals?
  (travel, giving, new cars, boat, vacation home, etc.)

- Do you anticipate any inheritances?