Mountain View Wealth Management

Preparing for Your Initial Consultation

Thank you for taking the time to prepare for our first conversation. The items below help us understand your full financial picture so we can make the most of our time together. Gather what you can — recent statements work well. You are welcome to bring everything with you, though sending documents in advance to info@mvwmllc.com or through our secure client portal gives us the chance to prepare more thoroughly. If you would like portal access, just let us know and we will gladly set that up.

FINANCIAL ASSETS

- ☐ Net Worth Statement / Balance Sheet
- ☐ Most recent federal tax return
- ☐ Retirement accounts — 401(k), 403(b), IRA, Roth (latest statements)
- ☐ Pension Statement / Benefit Summary
- ☐ Annuity Contract & Statement
- ☐ Brokerage Account Statements
- ☐ Health savings account (HSA) statements
- ☐ 529 and other education account statements
- ☐ Employer stock, options, or RSU summaries
- ☐ Mortgage and other loan statements
- ☐ Credit Report

INSURANCE

- ☐ Umbrella liability policy
- ☐ Life insurance policies (term and permanent)
- ☐ Disability income insurance
- ☐ Long-term care insurance
- ☐ Home and auto declarations pages

ESTATE PLAN DOCUMENTS

- ☐ Will
- ☐ Trust Documents
- ☐ Durable power of attorney (financial)
- ☐ Medical directive / healthcare power of attorney
- ☐ List of account beneficiaries
- ☐ Transfer-on-death and payable-on-death designations

PLANNING QUESTIONS — A FEW THINGS TO THINK ABOUT

What are your top six financial priorities, in order of importance?

1. ____________________
2. ____________________
3. ____________________
4. ____________________
5. ____________________
6. ____________________

Are there any financial concerns you'd like to discuss?

Looking ahead, what would make our work together a success for you?

NOTES AND QUESTIONS FOR US