LARSON
WEALTH MANAGEMENT

# Financial Planning Client Checklist

**Prior to the initial meeting, please:**

- ☐ Be prepared to share what you need and expect from a relationship with an advisor
- ☐ Bring a list of all questions you have for us
- ☐ Bring any statements or other documents you feel comfortable sharing
- ☐ Be prepared to discuss your two most important financial and life goals

**Once we enter into a planning relationship, please provide:**

- ☐ Completed Financial Planning Questionnaire (we can complete with you if you like)
- ☐ Most recent tax return
- ☐ Statements for all investment accounts
- ☐ Statements for all bank accounts
- ☐ All insurance policies or policy statements
- ☐ All mortgage or loan statements
- ☐ Completed Budget Worksheet
- ☐ All legal documents (wills, trusts, LLCs)