

Alexah Strongheart

astrongheart@iscgroup.com

314 741-0225

1732 Muriel Drive, St. Louis, MO 63138

www.strongheartfinancial.com

Meeting Checklist

In order to provide the best advice possible, please gather the following items to bring to the first planning meeting (additional items may be requested, not all items are applicable to everyone).

- current mortgage statement (on all properties owned)
- current Home Equity Line of Credit (HELOC) statement
- all personal loan statements
- last 2 years' tax returns
- all investment statements
- work benefits information
- pension calculations from benefits dept (if available)
- last two paystubs
- completed general data sheets (see forms section)

