

PORTFOLIO ADVISORS INC.



Initial Meeting - Information Sheet

Please complete the following information prior to your meeting.
Also, please find a list of helpful items to bring.

General Information

Name: _____ Birthdate: _____

Address: _____

Primary Phone : _____

Primary Email: _____

Spouse Information

Name: _____ Birthdate: _____

Primary Phone: _____

Primary Email: _____

Preferred Method of Contact

☐ Primary Phone for _____ ☐ Primary Email for _____

☐ Other _____

Personal Financial Documents (as applicable) that would be helpful to bring to your meeting:

- ☐ Personal Investment account statements – IRAs, Roth IRAs, 401(k)s, educational accounts, brokerage accounts, etc.
- ☐ Bank or credit union checking and savings account statements
- ☐ Most recent tax return
- ☐ Most recent paystub and/or retirement pension payment record
- ☐ Most recent Social Security Statements or payment records
- ☐ Life insurance/annuity statements
- ☐ Most recent mortgage statement(s)
- ☐ General information about personal debt - credit card statements, mortgage statements, etc.
- ☐ Copy of estate planning documents - wills, trust, health care directives, powers of attorney, etc.
- ☐ Other financial documents that you feel may be of assistance in developing a more complete understanding of your financial picture