BRIDGE ADVISORY

Thank you for choosing to work with Bridge Advisory for your planning and investment needs. In preparation for our first planning meeting please bring the documents below with you. We will assist you in scanning these documents and uploading them to your Bridge Wealth Platform document vault.

Remember, we will also be setting up connections to your financial institutions. Please have all of your current login information and passwords with you at our next meeting.

- Investments:
  - Account Statements
    - Brokerage (Schwab, TD Ameritrade, etc.)
    - Retirement (IRA, 401k, 403B, etc.)
- Insurance Policies:
  - Life, Disability, Home, Earthquake, Jewelry, Auto, Umbrella, etc.
- Income:
  - Salary, Social Security and Pension statements.
- Tax:
  - Tax Returns from the Current Year and Previous Year.
- Liability:
  - Mortgage, Auto, Personal Loans, Student Loans, etc.
- Estate Planning Documents:
  - Wills, Trusts, Financial Powers, Healthcare Powers, etc.
- Business:
  - Interests, Agreements (Buy-Sell, Buy-Out, etc.)
- Property:
  - Property Tax Statements, Deeds, Titles, etc.

We will also create an emergency folder in your vault. In this folder you should include specific instructions you would want your immediate family or agents to have access to in an emergency, such as household information (bill pay, services providers, etc.), medical information (medications, prescriptions, existing conditions) or websites & password information.

Keep in mind this is a process and we can put all of this information together over time. Our goal is to get your financial dashboard started and walk you through the initial startup of your plan. Congratulations on taking this initial first step to get yourself more organized and plan for the future.

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