arbus
capital management

Please bring a copy of as many of the following documents as possible for our first meeting. All information will be treated as strictly confidential.

1. Tax return for last two years.
2. A recent pay stub for each job (both spouses).
3. Any other income from trusts, alimony, child support, etc.
4. Recent investment account statements (banks, mutual funds, brokerage accounts, etc.).
5. Retirement plan statements (pension plans, deferred compensation plans, profit sharing plans, 401(k) plans, 403(b)s, 457s, TSPs, Keoghs, IRAs, annuities, etc.).
6. Your assessment of the value of your home(s), and estimate of other significant personal possessions.
7. Insurance policies you have (term, whole, universal, variable universal, disability insurance, employer provided insurance, long-term care, etc.)
8. A list of your liabilities, such as mortgage paperwork, home equity line of credit statements, personal loan statements, student loans, car loans, credit cards, etc.
9. List of any major purchases or expenditures forthcoming (car, home renovation, college tuition, boat, major medical expenses, financial support for relatives, etc.)
10. Your social security earnings and benefit statement(s) available at https://www.ssa.gov/.
11. Any future assets you expect to receive (trust disbursements, inheritances, settlements, etc.)
12. Any other documents that you feel may be helpful in assessing your situation.