FBB Capital Partners' Initial Consultation Checklist

To help us better assess your current financial situation, please bring the following items to your first meeting:

- Copies of statements for all brokerage, retirement, and savings accounts
- Benefits statements for Social Security and/or other pension benefits
- Recent statements related to any outstanding debt (mortgage(s), credit card(s), etc.)
- Copies of recent paystubs
- A copy of your most recent tax return
- An estimation of your current monthly savings and expenses
- Legal Documents (Wills/Trusts/Powers of Attorney)

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