INVISTA
ADVISORS

TEAM MEETING CHECKLIST

We want you to prepare for your first team meeting with an Invista Advisor, so we have created a list of helpful hints to help you get organized. Please view this a resource to help maximize your time with your Invista Advisor.

Print and bring your most recent copy of your:

- 401(k) statement with value and distribution/allocation of funds
- Other various retirement accounts
- Investment accounts
- Checking accounts
- Savings accounts
- Any other accounts
- IRAs
- Insurance statements including benefit amounts

If you are currently employed, call your benefits department and ask the following questions:

- What are the company's primary retirement benefits?
- Do I have various types of employer provided insurance benefits such as health, life, long-term care, disability, etc.? And, if so, what are the employer provided benefits?
- Do we have a pension or a lump sum rollover option?

Create a list of your debt, including:

- Approximate principal balances
- Interest rates
- Payment schedules
- Expected payoff period

Document your last six to 12 months' worth of spending, focusing on determining an average amount of spending per month.

Consider your long-term and short-term financial goals:

- Where do you want to be in 5 years, 10 years, etc.?
- Document these goals and be prepared to discuss them with your financial advisor.
- Having these goals in mind will assist you advisor in making appropriate recommendations for you.

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