

## **Items to Bring to Your Initial Personal Financial Fitness Evaluation**

1. All bank statements
2. All investment statements (mutual funds, stocks, bonds, retirement accounts, college savings accounts)
3. List of all real estate owned and what it's possible market value is
4. List of vehicles owned: including year, make, model
5. Any other investments owned/assets owned
6. All credit card statements
7. All mortgage statements
8. All student loan statements
9. All vehicle loan statements

Any other financial documentation you think is important to your financial fitness!