Householder Group
Estate & Retirement Specialists

As independent as you are.

Karen Day, CFP®
Lisa Kachel, CFP®
Financial Advisors

In order to prepare for your initial financial planning meeting with a Householder Group advisor, please bring the following documents:

- Confidential Financial Profile, including expense worksheet to the best of your ability
- Previous Year Tax Return
- Statement Copies:
  - Investments (401K, IRA, Mutual Funds, Annuities, Brokerage Accounts)
  - Insurance Policies (Life, Long Term Car, Disability)
  - Trust Information (Will)
  - Debts (Mortgage, Credit Card Balances, Other Loans)
  - Social Security Statement
  - Pension Statements

We hope this meeting will be beneficial to you in pursuing your financial goals. If you have any questions or concerns before your meeting, please give us a call at (503) 353-9700.