

DOCUMENTS FOR YOUR INTRODUCTORY MEETING

- Completed “About You and Your Finances” questionnaire (please return to our office in advance of your visit)
- Tax returns for the last two years
- Latest investment and retirement account statements

DIRECTIONS TO PFP AND PARKING



- From I-295, take Exit 6A: Forest Ave – South / Downtown to Congress Street (last light on Forest).
- Turn left on Congress Street. 511 Congress is between Casco and Brown Streets on the left, and has a large colorful metal sculpture in front of the building.
- PFP provides two hours of free parking for our visitors at One City [Center] Garage. To access the garage, turn to the right on Brown Street (the first right after 511 Congress), go one block, and turn left on Free Street. The garage entrance is 1 ½ blocks on your left. Please bring your ticket with you to be validated by PFP. The garage accepts CREDIT CARDS ONLY for charges after the first two hours.
- The PFP office at 511 Congress is to the right as you exit the elevator on the 8th floor.