



Materials to Review

Please send or bring the following items to your first planning meeting:

- Most recent pay stubs
- Most recent federal and state income tax returns – 2 yrs if possible
- Employee benefit statements and booklets
- Pension statements and/or booklets with pension formula
- Most recent Social Security benefit statements
- Bonus plans
- Values of titled personal assets
- Most recent investment statements
- Most recent mortgage statements, balance, mo. Pmt, interest rate
- Current wills, trust documents and other legal documents
- Life, disability and long-term care insurance policies, statements and illustrations (if available)
- Annuity statements
- Last three months of bank and/or money market statements
- Budget and cash flow sheet
- Deferred compensation arrangements
- Copy of driver's license