



GRELLA Financial Services
Real People Who Really Listen

Document List

Recent Tax return
Recent Brokerage statements
Bank statements (last 6 months)
EE and I Bond information
Savings Pass Books
Recent Employee sponsored retirement plan statement
Disability Insurance Information
Employer Life Insurance
Long Term Care policy and statements
Will and Trust documents
List of your monthly expenses
Auto insurance declaration page
Home insurance coverage page
Recent mortgage statement
Pension statements
Social Security Statements

Please do not hesitate to contact our office if you have any questions, we look forward to meeting with you.

The Grella Family