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During our upcoming visit, we will gain a better understanding of your goals and what is important to you. Copies of the documents below are necessary for us to provide you with an accurate analysis of your financial picture and identify possible solutions that are in line with your goals. ***Please understand that all conversation and documents provided are kept completely confidential.***

PLEASE BRING THE FOLLOWING ITEMS TO YOUR APPOINTMENT

Date: ___________________________________ **Time:** ____

☐ Current income and all income sources (year-end employer W2s should be with your tax information)

☐ Most recent Social Security statements

☐ Inventory listing of your stocks, bonds, savings bonds, mutual funds, annuity statements, brokerage accounts and other securities (with cost basis)

☐ Outstanding debt information with % rates + remaining term of the loan: auto loans, credit cards, home loans, student loans, etc.

☐ Inventory of business assets or fair market value of business enterprises (with cost basis)

☐ Financial Institution: checking account, savings and certificate of deposit statements

☐ Legal documents: wills, trusts, durable power of attorney, etc.

☐ Life insurance policies with most recent annual statements

☐ Long-term care insurance policies

☐ Potential pension information: monthly benefit, beginning age, survivorship and inflations adjustments

☐ All current retirement account statements: 401k, 403b, 457, IRA, TSP, etc.

☐ Desired retirement age(s) … you can choose more than one age. Include details of any "semi-retirement". (At age ____, retire to ____ days per week, with a reduced income of $____ until full retirement at age ____ .)

NOTES

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