

DOCUMENTS TO BRING TO APPOINTMENT



We have also provided a list of documents to bring below. We encourage you to bring whatever you are comfortable sharing. This information is not required, however, the more information we have the more comprehensive we can be in our planning.

- All Investment Statements (*401k, 403b, 457, IRA, Annuity, Mutual Fund, CD's*)
- Life Insurance Statements
- Long Term Care Insurance Statements
- Disability Insurance Statements
- Social Security Statements
- Pension Information
- Information about liabilities/Debts (*Amount, Duration, Interest Rate, Etc.*)
- Will/Trust Documents
- Previous 2 Years Tax Returns
- W2's
- Paystubs
- Any existing budgeting information
- Information about monthly expenses