



Please bring copies and/or be prepared to discuss the following at our meeting

Retirement

- When would you like to retire?
- How much will you need per month in retirement?
- Social Security statement
- Pension information

Liabilities & Expenses

- Mortgage information- Balance, interest rate, loan term, market value of home
- Other debts – HELOC, student loans, car notes, credit cards
- Budget or estimated monthly expenses
- Any big purchases in the near future?

Investments

- Recent statements for all investments, including retirement plans through your employer
- List of investment options through your employer

Taxes

- Copy of most recent tax return
- Copy of most recent pay stub

Estate Planning

- Will
- Trust
- Durable power of attorney
- Healthcare power of attorney
- Living will

College Savings

- 529 Plan/ESA details
- College goal for children

Other

- Any other information/goals you would like us to know about