



## Items to Bring

- Income Information: Most recent pay stubs or recent W-2 or 1099. Pension Statements & Social Security Statements/Projections.
- Current Bank Statements: Checking, savings, and money market accounts.
- Current Investment Statements: Brokerage accounts, mutual funds, stocks, retirement plans, etc.
- Recent Tax Returns
- Loan Information: Mortgages, student loans, credit cards, other loans.
- List of Other Assets: Other Real Estate, vacation property, etc.
- Spending Information:..however you choose to track your expenses.
- Estate Documents: Wills, trusts, powers of attorney.
- Life Insurance, Long Term Care, and Disability: Policies or recent statements.
- Property and Casualty Insurance: Declaration pages