

# What to Bring

## TO YOUR **COMPLIMENTARY** CONSULTATION

Please bring your most recent statements/documents.

### *Savings & Investments*

- Bank Accounts
- Investment Accounts
- Fixed/Variable Annuity Contracts

### *Insurance*

- Life (including premium notice)
- Disability (including premium notice)

### *Tax Returns*

- Federal & State (previous year)

### *Estate*

- Medical Directives
- Power of Attorneys (POAs)
- Trusts
- Wills

### *Other*

- Any relevant documentation that could add value to our consultation about your financial situation

### *Employment*

- Employer Retirement Plan Statements & Options (401k, 403b, TSP, % match, profit sharing)
- Payroll Stubs
- Pension Statements
- Social Security Statement (obtain yours at [ssa.gov/mystatement](http://ssa.gov/mystatement))

### *Loans*

- Primary Mortgage
- Secondary Mortgage (rental/home equity)
- Small Business
- Student
- Vehicles/Boats

### *Dependents*

- Educational Savings Accounts (529, etc.)
- Savings/Checking Accounts
- Custodial Accounts (UTMA, UGMA)



LIGHTHOUSEWLTH.COM  
301-865-9740

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