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)

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)

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