

Please Bring the Indicated Items to Your Next Appointment

Date: _____

Time: _____

- Current income and income sources (year end employer W2s should be with your tax information)
- Most recent social security benefit statements
- Inventory listing of your stocks, bonds, savings bonds, mutual funds, annuity statements, brokerage accounts and other securities (with cost basis)
- Primary residence property value & mortgage information (mortgage statement) – i.e. market value, outstanding balance, loan rate and maturity date (with cost basis)
- Non-primary residence property owned (mortgage statement) - i.e. market value, outstanding balance, loan rate and maturity date
- Outstanding loan statements (auto, credit card, etc)
- Inventory of business assets or fair market value of business enterprises (with cost basis)
- Financial Institution checking account, savings and certificate of deposit statements
- Tax returns (for past two years)
- Legal documents (i.e. wills, trusts, durable power of attorney, etc.)
- Life insurance policies, with most recent annual statements
- Long term care insurance policies
- Potential pension information – i.e. monthly benefit, beginning age, survivorship and inflation adjustments
- Desired retirement age(s)...you can choose more than one age. Include details of any “semiretirement”.
(At age ____, retire to ____ days a week, with a reduced income of \$ ____ until full retirement at age ____).

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