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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 _____).