

## 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 \_\_\_\_).