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*Statements & Information Useful in Preparing your
Financial, Retirement, & Investment Plans*

Most recent investment statements from:

- trust companies
- brokers
- investment companies
- banks
- retirement plans (IRA, 401k, profit sharing, etc.)

Most recent mortgage and other loan statements including:

- mortgage payment
 - date loan(s) funded, length of loan, interest rate, original principal amount
- Monthly living expenses (excluding mortgage & loan payments represented by statements above)

Insurance policies & statements for (to the extent you wish included in your planning):

- liability insurance
- disability insurance
- long-term care insurance
- life insurance

Pension & Social Security statements

Stock option agreements & statements

Tax returns (Form 1040) from prior year

Legal documents including:

- wills
- power of attorney
- trust documents

Salary withholding & employee benefit information

List of primary planning questions you have

List of financial goals which take both money and planning to achieve with dates and projected amounts including:

- major future purchases and/or expenses
- retirement income requirements

Other relevant documentation applicable to your individual planning needs