

## ITEMS TO REMEMBER

In an effort to become familiar with your current situation please remember to bring with you on your appointment date, or, fax to our office prior to your appointment, the most recent version of the following items:

- Personal and Business tax return with all schedules for the past two years**
- Social security statements**
- Employer retirement plan statements**
- Account Statements for investments/savings**
- Mortgage statements for primary and investment property**
- Pay stub for employees/ YTD income statement for self employed**
- Employer's Benefits Information**
- Wills and other related legal documents**
- Business entity or contract documents**
- All Business insurance contracts**
- All Personal insurance contracts**
- Last two months of all credit card and checking account statements**
- Loan documents (personal or business, for example: car, boat, line of credit, etc.)**
- Current Driver's License**
- Other items you would like me to review or be aware**

Once again, we appreciate the opportunity to be of value to you and your family. See you soon and please call if you need anything prior to our visit.