

Items to Remember

In an effort to become familiar with your current situation, on your appointment date, please bring with you the following items:

- Personal and business tax return with all schedules for past two years
- Social Security Statements
- Employer retirement plan statements
- Account statements for investments/savings/bank
- Mortgage statements for primary and investment property
- Last two pay stubs/ YTD income statement for self-employed
- Employer's benefit information
- Wills and other related legal documents
- Business entity or contract documents
- All business insurance contracts
- All personal insurance contracts
- Credit card statements
- Current drivers license
- Loan documents, any personal/ business loans, (house, vehicle, property)
- Other items you would like me to review

We appreciate the opportunity to be of value to you and your family. We look forward to visiting you.