

**PLEASE BRING THE FOLLOWING DOCUMENTS TO YOUR SCHEDULED MEETING:**

- Income Tax Returns: past 2 years
- Most Recent Pay Stub
- Investment Statements: Mutual Funds, Stocks, Bonds, Ira, 401 K, TSA, Profit Sharing Plan , SEP, Keogh
- Checking & Savings Statement
- Breakdown Of All Monthly Expenses
- Insurance Statements: Life Insurance, Disability, Home Insurance & Auto Insurance
- Annuity Statements
- Wills & Trusts
- Company Benefits Statements
- Social Security Statements
- Business Documents: Buy/Sell, Deferred Comp, Group Benefits Programs, Etc (If Applicable)

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