

Helpful Information to Bring to the Meeting

Federal Tax Return

Assets

Investment Statements (Brokerage Accounts, Bank Accounts, etc)
Retirement Account Statements (IRAs, 401ks, pension plans, etc)
College Funding Account Statements
Annuity Contracts / Statements
Life Insurance Contracts / Statements
Other Assets (Real Estate, stock options, small business interests, etc)

Liabilities

Mortgage Statements
Credit Card Statements
Auto Loans
Other Losses

Other Helpful Information

Company Benefit Information
Medical, Disability, and LTC Insurance contracts / statements
Property and Liability (Homeowners, Auto, Umbrella, Flood, Professional) contracts / statements
Social Security Statements
Wills and Trusts and other Estate Documents