



Helpful Review Materials

Please send or bring the following items to our office:

- Most recent paystubs
- Most recent federal and state income tax returns
- Employee benefit statements and booklets
- Pension statements and/or booklets with pension formula
- Most recent Social Security benefit statements
- Bonus plans
- Values of titled personal assets
- Most recent investment statements
- Most recent mortgage statements, origin date and amount
- Current wills, trust documents and other legal documents
- Life, disability and long-term care insurance policies, statements and illustrations (if available)
- Annuity statements
- Last six months of bank and/or money market statements (particularly the account you pay your bills out of)
- Stock option and restricted stock statements
- Deferred compensation arrangements

Please include the following business related items:

- Current profit and loss statement
 - Buy-sell agreements
 - Business insurance policies, statements and illustrations (if available)
 - Retirement plan document
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