



# WHAT TO BRING

## INCOME/EXPENSE DATA

- List of Assets and Liabilities (if available)
- Monthly Expense Worksheet (if available)
- Pay Stubs

## STATEMENTS

- Bank Statements
- Mortgage or Loan Statements
- Retirement Account Statements
- Investment Statements
- Listing of Available Investment Options in Investment and Retirement Accounts and Fund Performance
- Social Security Statements (obtain from website [www.ssa.gov](http://www.ssa.gov) > estimate your retirement benefits)

## TAX INFORMATION

- Tax Return (last two years)

## BENEFITS

- Pension Benefit Statement and Booklet
- Stock Options
- Summary of Employee Benefits

## INSURANCE POLICIES

- Homeowner and Auto Declaration Pages
- Life, Disability or Long Term Care Insurance Policies

## MISCELLANEOUS

- Wills, Trusts, Living Wills, Healthcare Powers of Attorney (POA), or other POAs
- Deferred Compensation Agreement/Statement
- Divorce Settlements or Decrees
- Notes Receivable and/or Notes Payable
- Business Agreements
- Business Liability, Director and Officer Insurance Policies