DOCUMENTS NEEDED

The following documents/information will be helpful in analyzing your financial situation to create your financial/retirement plan and, in turn, make appropriate recommendations. All information provided will be treated confidentially and returned when the planning process is completed, or earlier if requested.

Name ______________________________DOB_____/_____/_____ Retirement Date_____/_____/_____

Name ______________________________DOB_____/_____/_____ Retirement Date_____/_____/_____

From your

Personal Files

- ❑ Income tax return and W2 statement(s)
- ❑ Social Security statement(s) – can access at www.ssa.gov
- ❑ Mortgage loan statement(s)
- ❑ Listing of real estate/land owned outside of primary residence

Employer
(or Previous Employer)

- ❑ Company retirement plan statement(s)
  - o 401k, 403b, 457, TSP, SEP/SIMPLE IRA, etc.
- ❑ Pension plan and/or company stock option information

Bank or Credit Union

- ❑ Checking/Savings/Money Market statement(s) or balance(s)
- ❑ CD and/or Savings Bond statement(s) or listed information

Brokerage or Mutual Fund Company

- ❑ Monthly or quarterly account statement(s)
  - o Joint, Individual, Trust, Traditional IRA, Roth IRA, Inherited accounts, 529 Plan or other Educational Savings account(s), etc.

Insurance Information

- ❑ Life insurance policy(s) and statement(s)
- ❑ Annuity contract(s) and statement(s)
- ❑ Long-term care policy(s) and statement(s)
- ❑ Health Savings Account (HSA) statement(s)

Additional Info *(personal savings goals; future expense planning for second home, travel, education, wedding; inheritance received/expected; starting/selling business; recent layoff or job change; health considerations)*

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STEVE ROBBINS, CFP®
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