

Materials to Review

Please send or bring to our office the follow items that apply to you:

- Most recent pay stubs
- Last **two years** of federal 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 three months of bank and/or money market statements
- Stock option and restricted stock statements
- Deferred compensation arrangements

Please complete and include the following:

- Spending Plan
- Investor's Questionnaire

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