

Documents to Bring With You to Your Appointment

- Last three (3) years of Federal and State Tax Returns
- Most recent paycheck stub
- Pay off value of mortgage
- Pay off value on all car loans
- Face sheets of all life insurance policies – reflecting any actual value
- Legal description of all real estate
- VIN numbers and/or copies of all vehicle titles
- Most recent statement of all investment portfolios, 401K's, IRA's, CD's.
If you hold/own any stocks, please identify the costs basis for same and the date of acquisition.
- Name, address and phone number of retirement plan administrator
- Most recent credit card statements
- Copies of health insurance plan and/or statement from employer regarding monthly cost for you and your child(ren)

Please Note: There will be time to supplement this information if you are unable to get everything together before your initial consultation.