



Data Gathering List

In order to provide you with the high-quality advice and service you deserve, please bring the following items to our next meeting:

- ✓ Most Recent Tax Return
- ✓ 401(k) or other Retirement Statements
- ✓ Retirement Benefit Summary / Pension
- ✓ Investments Statements (Savings accounts, CDs, other brokerage accounts)
- ✓ Social Security Summary Report
- ✓ Employee Benefit Summary
- ✓ Recent Mortgage Statements
- ✓ Loan/Credit Card Statements
- ✓ Recent Pay Stubs
- ✓ Life Insurance Policies
- ✓ Car Loan Statements
- ✓ EE Bond Values
- ✓ Any Pertinent Legal Documents (Will, Living Will, Power of Attorney)