

DOCUMENT NEEDS LIST

1. LATEST TAX RETURNS Federal and State, all schedules
2. BANK AND BROKERAGE STATEMENTS with details of investment holdings
4. 401K, 403B, and IRA (Regular, SEP, Roth) pension statements
5. PAY STUBS(s) covering the last 30 days
6. TRUST DOCUMENTS if applicable
7. SOCIAL SECURITY Administration Estimate of Benefits form
8. STATEMENT of estimated Pension Benefits
9. ANNUITY STATEMENTS

If you don't have time to make copies of the above documents, bring the originals and I will copy and return them to you promptly.

NOTE If needed, additional documents may be requested.