Please be prepared to discuss/ or bring copies of the following items to your meeting

Retirement

- What age would you like to retire?
- How much would you like to spend on a monthly basis in retirement?
- Social Security Statement
- Pension Details
- Additional Retirement Goals

Liabilities/Expenses

- Mortgage Information – Balance, Interest Rate, Loan Term, Fair Market Value of home
- Details regarding any debt – Car Loans, Home Equity Line, Credit Card, Student Loans
- Budget or an estimate of current monthly living expenses
- Any anticipated future expenses/purchases

Investments

- Most Recent Statements for all investments
- Work Retirement Plan Statements
- Listing of Investment options

Taxes

- Complete Copy of your most recent tax return
- Copy of your most recent paystub

Insurance

- Life Insurance details – Both Individual policies and Employer provided
- Disability Insurance Details - Both Independently purchases and Employer provided
- Declaration Pages for Home, Auto, and Umbrella policies
- Long-Term Care insurance Details

Estate Planning

- Will
- Trust
- Durable Power of Attorney
- Healthcare Power of Attorney
- Living Will

Other

- Other Real Estate Values
- College Savings/ 529 Plan Details
- Business Information/ Equipment
- Any other financial information relevant to your situation