Current and Prospective Client Document List

To create or update a retirement plan, please bring the following information:

- ☐ Bank account or CD statements
- ☐ Investment statements
- ☐ Online user names and passwords
- ☐ Typical paycheck stub
- ☐ Pension statements or projected benefits
- ☐ Life insurance policies and annual statements
- ☐ Long Term Care policies and annual statements
- ☐ Recent Federal and State tax return including all supporting documents
- ☐ Mortgage payment amount and time remaining – NOT including escrow
- ☐ All debt balances, interest rates, payment amounts, time remaining
- ☐ List of savings bonds
- ☐ Wills, Trusts and Powers of Attorney
- ☐ Social Security estimate or annual October statement (Depending on your age you may not be receiving printed estimates in the mail. You will need to establish an account online with the Social Security office at www.ssa.gov to print your current information.)