DOCUMENTS NEEDED

The following documents will be helpful in analyzing your financial situation to create your retirement income plan and, in turn, make appropriate recommendations. The information provided will be treated confidentially and returned when the planning process is completed, or earlier if requested. Please provide the most recent data and statements for all information below that pertains to you.

From your

Personal Files	❑	Income tax return and W2 statement(s)
	❑	Social Security statement(s)
	❑	Mortgage loan statement(s)
	❑	Listing and approximate value of real estate and/or land owned
Employer (or Previous Employer)	❑	Company retirement plan statement(s) o 401k, 403b, 457, TSP, SEP/SIMPLE IRA, etc.
	❑	Pension plan information
	❑	Stock option information
Bank or Credit Union	❑	Checking account statement(s) or balance(s)
	❑	Savings/CD/Money Market account statement(s) or balance(s)
	❑	Savings Bond statement(s) or listed information
Broker or Mutual Fund Company	❑	Monthly or quarterly account statement(s) o Joint, Individual, Trust, Traditional IRA, Roth IRA, Inherited IRA, Educational Savings account, etc.
Insurance Information	❑	Life insurance policy(s) and statement(s)
	❑	Annuity contract(s) and statement(s)
	❑	Long-term care policy(s) and statement(s)
	❑	Health Savings Account (HSA) statement(s)

Additional Comments: ______________________________

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STEVE ROBBINS, CFP®

WEALTH MANAGEMENT FOR A FLOURISHING RETIREMENT

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