

List of Financial Planning Documents

- Recent statements from brokerage accounts, mutual funds, pension plans, IRA accounts and other investments
- Recent mortgage and other loan statements including balances and terms of the debt
- Copies of your most recent Federal and state personal income tax returns
- Relevant parts of insurance policies showing insurance amounts and beneficiaries
- Employee benefit information, particularly for pensions and any post-retirement benefits for which you may qualify
- Social security information showing your current benefits