



## **What To Bring To The Meeting**

- ☐ Most recently filed Federal Income Tax Return and W-2 Forms
- ☐ Current Mortgage Statement
- ☐ Current Retirement Statements (401k, IRA, Pension, 403b, etc.)
- ☐ Current Investment Statements (mutual funds, stocks, annuities)
- ☐ Current Savings & Checking Balances
- ☐ Life Insurance Statements
- ☐ Current Pay Stubs
- ☐ Trust Document