Document Check List

- Most recent tax return
- Pay stubs
- Will/trust documents
- All brokerage firm and/or investment statements
- All IRA, 401(k), pension and retirement statements
- All life, annuity, & long-term care insurance
  (you have personally and/or through work)
- Most recent Social Security statement
  (go to www.SSA.gov to download)
- Budget - https://www.presperfinancial.com/resources
  (bottom of the page)
- Same information for your partner (if applicable)

Please bring these items with you to our meeting.

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