



Documents Needed For Planning

The Retirement LifeStyle Workbook will help you outline your goals and determine the resources you have available to achieve those goals. This is an important step to help us begin building your financial plan. In addition to completing the workbook, please also provide the following documents (if available) to assist us in understanding your current financial situation.

- Statements from brokerage, mutual fund, employer stock option, 529 Savings Plans or other investment related accounts
- Statements from profit sharing, pension, 401(k), 403(b), IRA, Roth IRA, deferred compensation or other retirement accounts (please include available investment options for each account)
- Pension projection statement from employer
- Most recent personal income tax return
- Most recent employee paycheck stubs and benefits statements
- Mortgage & loan statements
- Statement of estimated Social Security benefits
- Monthly budget
- Any previous financial planning analysis prepared for you