

Mr. /Mrs. Client,

Congratulations, you are now moving towards an organized retirement with no surprises!

In order to make your “Retirement Profile” personal and accurate, you will need to have the following items on hand when we get together:

1. A **recent pay stub** for each spouse so we can accurately calculate current income.
2. Most recent statements from any **Retirement Accounts** which are specifically earmarked for retirement including **IRAs, 401Ks, brokerage statements, mutual funds, stocks, variable annuities, etc.** This program is designed to create a picture of what retirement may look like, so items such as savings accounts and cash on hand for short term plans like vacation or emergency funds are not included in retirement calculations but please bring those statements also.
3. Most recent copies of any personal **insurance statements** including **life insurance, fixed annuity contracts, long term care and disability insurance.** This will give us an accurate picture of how any unexpected or unfortunate occurrences would affect your current and future situation.
4. A recent **Statement of Benefits from the Social Security Administration** for each spouse. If you do not have your statement, you can log on to www.ssa.gov. and select the estimate your benefits tab. Input your social security number, your mother’s maiden name and your state of birth and follow the instructions. This will produce your most recent statement of benefits. Please include this in your initial consultation. If you have further questions please call the Social Security office toll-free at 800-772-1213.
5. **Insurance or pension benefits provided by your employer** if any. This may include health, life or disability insurance policies, along with any pension benefit statements. Please make sure if you have a pension that you have the pension benefits available. This information can be obtained by contacting your pension plan.
6. **Most recent tax return** (state & federal). We will need your total itemized deductions and personal exemptions.

Remember, there is no charge for this consultation and you will receive a personalized portfolio. The above items are utilized in creating your retirement income analysis, therefore a copy may be requested for our confidential files. Any original documents will be returned for your records.

If you have any questions please do not hesitate to call my office at 800-_____.

Best Regards,

Printed Name