To help us focus our advice on your personal needs, please bring the following information to our meeting:

- Last year's tax return.
- Your will and other estate planning documents.
- A recent pay stub.
- Balance sheet information (You can use our attached "Balance Sheet Template" as a guide or bring the requested information in any format that is convenient and makes sense to you).
  - Details of your home (value, amount of mortgage, mortgage payment)
  - Recent statements from retirement accounts (IRAs, 401(k)s, TSPs)
  - Information on other major assets.
  - Details of any debts – amount outstanding, interest rate and payment.
  - Highlights of any health, disability and life insurance policies.
- A list of questions that you would like us to address.
- Any other information that you would like us to consider.

Be sure to call if you have any questions during the "data gathering" stage. <u>If you have trouble finding any of the information or are uncertain about the level of detail feel free to leave it out and proceed with your meeting as scheduled</u>. We look forward to meeting with you.