

Please bring the following items to our next meeting: (all may not apply)

- Value of Assets and Balances of Liabilities
- Current Monthly Expenses
- Your most recent paystubs
- Your most recent mortgage statement
- A Summary of your currently enrolled benefits
- 401K statements with a list of options available
- Pension Estimates
- Most Recent Social Security Benefits Statement:
<https://secure.ssa.gov/RIL/SiView.do>
- Investments / Real Estate Holdings
- Life Insurance Policy
- College Savings Accounts
- Checking/Savings accounts and CD balances
- Investment Account Statements