

**PLEASE BRING THE FOLLOWING ITEMS TO OUR
UPCOMING MEETING:**

- Last 2 Pay Stubs
- Most Recent Tax Return
- Retirement Plan Statements (IRA, Roth, Pension, TSA, 401K, TSP, etc.)
- Brokerage Account Statements
- Mutual Fund Statements
- Children's Investment Statements (Custodial, Educational IRA, 529 Plans)
- Bank and Credit Union Account Statements
- List of Stocks Owned (Outside of Brokerage Accounts)
- List of Real Estate Owned (Present Value, Cost Basis, Mortgage Balance)
- Annuities (Contracts & Latest Statements of Value)
- Life Insurance Policies & Most Recent Statements
- Mortgage, Credit Card, & Other Loan Statements
- Approximate Value of Other Collectibles (Rare Coins, Bullion Coins, Art, etc.)
- Trusts, Wills, & Power of Attorneys
- Social Security Statements
- Driver's License, State ID, or Passport Identification

Additional items:

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Raleigh, North Carolina | 919-760-5589
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