



Please bring the following documents or information with you for your appointment to better assist you with your retirement planning consultation and True Wealth analysis:

- Copies of your most recent Federal and State Tax Return in order to analyze current tax deductions and calculate your marginal tax brackets.**
- Your current mortgages on your home and other real estate properties including:**
 - **Date of loan origination**
 - **Term of Mortgage [15 or 30 year, or Adjustable]**
 - **Type of Mortgage [fixed, adjustable, Min.Pay, Interest Only]**
 - **Amount financed**
 - **Interest Rate**
 - **Principal and Interest Payment per month**
 - **Property Tax and homeowners insurance per month**
- Recent statements and information regarding your:**
 - **IRAs**
 - **401Ks**
 - **Other Retirement/Pension Accounts**
- Recent statements or information regarding:**
 - **CDs, Savings, and money market Accounts**
 - **Annuities**
- Recent statements or information for all Brokerage Accounts**
 - **Stocks, Mutual funds, Bonds**
- Information on all Life Insurance Policies [Group and Individual]**
- Information all All Debts, Loans [incl. Monthly payments and Balances]**
- Copies of your current Living Trust and/or Wills [if completed]**