If available, please bring these items with you:

- *A copy of last year's tax return, current wills, trusts and/or business arrangements;*
- *Copies of all bank statements which include: account numbers, interest rates, maturity dates, account balances;*
- *Copies of all IRA, TSA, 401 (K) statements which include: account numbers, interest rates, maturity dates, account balances;*
- *Any life, disability and/or nursing home policies (including premiums and/or recent dividend statements, policy loan balances, etc.);*
- *Mutual fund statements;*
- *Lists of stocks and/or bonds (statements or shares);*
- *Annuities (including annual reports);*
- *Any pension and/or retirement data;*
- *Any data on money owed (dollar amount, interest rate, and balance due);*
- *Any other financial data you feel pertinent;*
- *Any Home owners, Auto and Umbrella policy Insurance Declaration Pages.*

The more data we have, the better we are able to serve you.
Thank You!
P.S. All data is strictly confidential!!

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