Things We Need Before Your Annual Review

Please be sure I have these no later than a week before our review either by mail, email or fax. Thanks!

1. Most recent declarations pages for any auto, home, or liability policy.

2. Most recent investment statement for any savings, investment, stock options, cash value life insurance or retirement savings account that Paul does not receive statements from the vendor as the financial representative.

3. Coverage information on any new insurance purchased in last year not through our office.

4. Most recent employee benefits statement/offerings; including a description of what benefits are offered, which of these benefits you have selected, how much you pay for any benefits, and whether your benefit contributions are pre or post tax.

5. Updated loan balances and most recent statements for any new or existing loans including mortgage/s, credit cards (only those that are not paid in full each month), car loans, etc.

6. One months' worth of pay stubs.

7. Last year's tax return and W2 copies (unless we prepared your return).

8. Most recent Social Security Benefits Statement. At this time the Social Security Administration is not sending out annual statements. You will need to go online to get an estimate at http://www.ssa.gov/estimator. Please also provide to us your birth state and mother's maiden name so we can check your benefits as well.

9. Copy of any legal documents executed within the last year, including wills, trusts, advance directives, and power of attorney.

10. Please provide current values of any real estate owned, whether personal residence or investment property.

11. Copy of Action Plan with completed items checked off.