



Protection • Guidance • Prosperity

## What to Bring to Your Appointment

1. Income Tax Return(s) for last year
2. Paycheck Stub(s) for you and your significant other showing deductions from gross income
3. Statements for each investment you own, where applicable
4. All Insurance Policies (please include declarations of coverage)
  - Automobile and Homeowners Policies
  - Liability Coverages
  - Life Insurance Policies (for all members of your family)
  - Disability Income Insurance Policy
  - Any other types of insurance policies
5. Company-provided Group Benefits for you and your significant other (please include a printout of specific coverages if available)
6. Will and Trust documents