Documents Needed

The following documents will be needed to properly study, analyze, and prepare a strategy for you. This material will be treated confidentially and returned when the process is completed, or earlier if requested.

From Your:

Personal Files	☐ Last two years Tax Return & W2 ☐ Loan Documents ☐ Trust Agreements ☐ Wills ☐ Social Security Statement
Employer	☐ Payroll or Income Statements ☐ Pension Plans ☐ Retirement Savings Plans ☐ Employee Benefits Booklets
Bank or Credit Union	☐ Checking Account Statements ☐ Credit Card Statements ☐ Savings/CDs/Money Market
Broker or Mutual Fund Company	☐ Latest Statements (401(k) Statement, Pension Statement, Brokerage Accounts, Trust Accounts, etc.)
Insurance Company	☐ Life Insurance Statements ☐ Annuity Statements ☐ Long Term Care Policy Info. ☐ Disability Insurance Information ☐ Health Insurance Information ☐ Auto and Homeowners Insurance
Assets	☐ Approximate Value of Other Assets (Home, Real Estate, Vehicles, Collectibles, etc.) ☐ Mortgage Statement

*Please bring anything not listed that pertains to your financial information.

Financial Care Providers® • Angela R. Rehkop ChFC®, CFP®
5097 Peachtree Rd NE • Unit i • Atlanta, GA 30341
Direct: 770-353-6333 • Mobile: 404-285-6504 • Angie@FinancialCareProviders.com