Required (If applicable)

1. **Investment Accounts**: Statements for any IRAs, TSAs, 401(k)s, or other investment accounts (include account numbers, balances, and interest rates).
2. **Retirement Data**: Information on pensions, Social Security, or other retirement benefits.
3. **Insurance Policies**: Information on life, disability, or nursing home insurance policies (including premiums, dividend statements, and policy loan balances).
4. **Debt Information**: Details on any outstanding debts, including minimum payments, interest rates, and balances due.

Optional (If applicable)

1. **Tax Documents**: A copy of last year's tax return.
2. **Estate Planning Documents**: Current wills, trusts, or any business arrangements.
3. **Bank Statements**: Copies of recent bank statements (including account numbers, interest rates, maturity dates, and account balances).
4. **Mutual Funds & Stocks**: Statements or lists of mutual funds, stocks, or bonds.
5. **Annuities**: Annual reports or statements for any annuities.
6. **Insurance Policies**: Homeowner, auto, and umbrella insurance declaration pages.
7. **Medicare**: If 65+, information on any existing Medicare policies.
8. **Any Other Pertinent Financial Data**: Any other information you think may be useful for our meeting.