

AGATE FINANCIAL SERVICES

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PLEASE BRING THE ITEMS INDICATED TO YOUR NEXT APPOINTMENT

Date: _____ Time: _____

All statements should be the most recent month, quarter, or current year where possible.

- Current income and income sources (i.e., paystubs, monthly statements, etc.)
- Most recent social security benefit statements (generally comes 3 months prior to each birthday; or go to www.ssa.gov – My Social Security – Create an account to get your most up-to-date statement of benefits)
- Statements showing current investments and values of your stocks, bonds, savings bonds, mutual funds, annuity(s), brokerage accounts and other securities (with cost basis)
- Primary residence information (i.e., property market/tax value with cost basis, mortgage/home equity statements)
- Non-primary residence and/or other real property(s) owned (i.e., market/tax value with cost basis, outstanding balance, loan rate and maturity date)
- Outstanding loan statements with interest rates and term – (i.e., auto, credit card, student loan, etc.)
- Inventory of business assets or fair market value of business enterprises (with cost basis and debt information)
- Bank/Credit Union accounts (i.e., checking, savings, certificates of deposit, etc.)
- Most recent tax returns for the past two years including supporting documents (i.e., W2s, 1099s, property taxes, etc.)
- Legal documents – (i.e., wills, trusts, powers of attorney, estate plan, healthcare directives, marital/divorce documents, etc.)
- Insurance policies with most recent statements – (i.e., life, long/short term care, long/short term disability, health, auto, homeowners, umbrella, etc.)
- Pension information from current and/or previous employers – (i.e., current value, monthly benefit, beginning age, survivorship/beneficiaries and inflation adjustments)
- Desired retirement age(s)...you can choose more than one age. Include details of any "semi-retirement". (At age _____, retire to _____ days a week, with a reduced income of \$ _____ until full retirement at age _____).
- Other goals (i.e., start a business, college, other) _____

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