MASON

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Documents Needed for Planning

Please upload the documents below **IN ADVANCE** of your meeting using this secure link: **Secure Document Upload.** You may also fax or mail them to us in prior to your appointment. All information will be treated **CONFIDENTIALLY.**

Most Recent Payroll Stub(s), LES (ELS), Earnings/Annuity Statements

- ☐ Self
- ☐ Spouse

Current Social Security Statement(s)

- ☐ Self (www.ssa.gov)
- ☐ Spouse (www.ssa.gov)

Income Tax Returns (past two (2) years)

- ☐ Self
- ☐ Spouse (if filing separately)

Divorce Decree(s), Separation Agreement(s), and Prenuptial Agreement(s)

- ☐ Self
- ☐ Spouse

Company Benefits (Non Federal)

- ☐ Retirement
- ☐ Insurance
- ☐ Pension Estimates

Insurance(s), Annuity Contracts, and Annual Statements

- ☐ Life
- ☐ Disability
- ☐ Group Insurance
- ☐ Annuities (Variable, Fixed, and Index)
- ☐ Long-Term Care Plans

Savings and Investment Statements

(current statements preferred)

- ☐ Thrift Savings Plan **(tsp.gov)**
- ☐ IRAs / Roth IRAs
- ☐ Mutual Fund / Savings Accounts/CD's
- ☐ Brokerage Accounts
- ☐ 401(k) / Keogh / SEP Accounts
- ☐ 403(b) (Tax Sheltered Annuities)
- ☐ Pension Plans / Profit Sharing
- ☐ Voluntary Contribution Plan (CSRS ONLY)
- ☐ Other

Other

- ☐ Mortgage Statement(s) to include:
  - Original Balance
  - Current Balance
  - Interest Rate
  - Term
  - Payment

******Be sure to have the following items available to you during your meeting:***

- ☐ Driver's License(s)
- ☐ VRS Member Benefit Profile (Available on-line)
- ☐ Federal Employee Personal Statement of Benefits (EBIS) (Available on-line from OPM)