MASON
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STRATEGIC PLANNING PREP SHEET

Please upload the documents below **NO LATER THAN 14 DAYS IN ADVANCE** *of your meeting using this secure link: Secure Document Upload. You may also fax or mail them to us prior to your appointment. All information will be treated* **CONFIDENTIALLY.**

Most Recent Payroll Stub(s) / LES or ELS

- Self
- Spouse

Current Social Security Statement(s)

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

Income Tax Returns (most recent)

- Self
- Spouse

Savings and Retirement Statements.

For accounts not held with Mason & Associates
(current statements preferred)

- Federal Thrift Savings Plan (TSP)
- IRAs / Roth IRAs
- Mutual Funds / Savings Accounts / CD's
- Brokerage Accounts
- 401(k) / Keogh / SEP Accounts
- 403(b) (Tax Sheltered Annuities)
- Pension Plans / Profit Sharing

Insurance / Annuity Contracts, Statements, and In-force Illustrations

For accounts not held with Mason & Associates

- Life
- Disability
- Group Insurance
- Annuities
- FEGLI / VRS Group Life
- Long-Term Care Plans
- VRS Member Benefit Profile (available online)
- Federal Employee Personal Statement of Benefits (GRB, formerly EBIS) (Available on-line from OPM)

Other

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

Questions

Email responses to masonsupport@cfiemail.com.

1. What has changed since our last meeting?
   a. Family
   b. Financial
   c. Work
2. What are the big items you want to discuss at our meeting?
3. Has your retirement goal changed?
4. What debt have you eliminated or acquired?

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

- Logins/Passwords for TSP, 401(k), Social Security, OPM, DFAS/myPay, Employer HR portal, bank, mortgage company

Information required for update/confirmation of account paperwork:

- Banking Information: Routing & Checking
- Beneficiary Information: Name, DOB, SSN, Address, Phone Number