

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@masonllc.net

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

