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STRATEGIC PLANNING PREP SHEET

Please bring **PHOTOCOPIES** of the following applicable documents to our meeting.
All information will be treated **CONFIDENTIALLY**.

Most Recent Payroll Stub(s) / LES

- ☐ Self
- ☐ Spouse

Current Social Security Statement(s)

- ☐ Self
- ☐ Spouse

Income Tax Returns (most recent)

- ☐ Self
- ☐ Spouse (if filing separately)

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 on-line)
- ☐ Federal Employee Personal Statement of Benefits (GRB, formerly EBIS) (Available on-line from OPM)

Other

- ☐ Passwords: TSP, 401(k), Social Security, OPM, DFAS/myPay, HR portal, Payroll service, Bank, Mortgage company, Email
- ☐ Banking Information: Routing & Checking
- ☐ Beneficiary Information: Name, DOB, SSN, Address, Phone Number

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?