



# STRATEGIC PLANNING PREP SHEET

Please upload the documents below **NO LATER THAN 7 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](http://www.ssa.gov))
- Spouse ([www.ssa.gov](http://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](mailto: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