MASON
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STRATEGIC PLANNING PREP SHEET

Please upload the documents below **30 days in advance of your meeting**. *You may also fax or mail them to us prior to your appointment.*

Payroll Stub(s) / LES

- ☐ Self
- ☐ Spouse

Social Security Statement

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

Federal and State Tax Return

- ☐ 2022 Federal
- ☐ 2022 State

Savings and Retirement Statements

For accounts not held with Mason & Associates

- ☐ Thrift Savings Plan (TSP)
- ☐ IRAs / Roth IRAs
- ☐ Mutual Funds / Savings Accounts / CD's
- ☐ Brokerage Accounts
- ☐ 401(k)
- ☐ 403(b) (Tax Sheltered Annuities)
- ☐ Simple, SEP, Other Plans

Insurance & Annuity Contracts

- ☐ Life Insurance Annual Statement
- ☐ Disability Annual Statement
- ☐ Group Insurance (Amount and Cost)
- ☐ Variable, Fixed, or Index Annuity Statement
- ☐ Long Term Care Annual Statement
- ☐ Long Term Care Premium Adjustments
- ☐ Life Insurance Illustrations

Retirees

- ☐ DFAS Retiree Account Statement
- ☐ OPM Annuity Adjustment
- ☐ OPM Annual Summary of Payments
- ☐ VRS Monthly Benefit
- ☐ FERS/CSRS Retiree Benefit Booklet
- ☐ FEGLI (servicesonline.opm.gov)
- ☐ VRS Insurance Amount

Other Documents

- ☐ Mortgage Statement
- ☐ Other Debt
- ☐ Restricted Stock
- ☐ Options
- ☐ Other Company stock incentives
- ☐ VA Disability Award Letter
- ☐ Monthly Budget
- ☐ OPM 1099R
- ☐ TSP 1099R
- ☐ W2s
- ☐ Other tax forms

How to Prepare

- ☐ Download Zoom at Zoom.us
- ☐ Upload documents 30 days in advance
- ☐ Review & Complete Agenda
- ☐ Have list of usernames and passwords
  - ☐ 401(k)
  - ☐ Servicesonline.opm.gov
  - ☐ DFAS / MyPay
  - ☐ TSP
  - ☐ Social Security
  - ☐ Mortgage
  - ☐ Employer HR Portal