

Documents to Bring to your Next Meeting with The Rehmann Group at Morgan Stanley

It is important you bring the following documents with you to our next meeting:

Tax Planning

- Prior Years Tax Return

Retirement Planning

- Social Security Estimates
- Pension Statements
- Annuity Statements

Cash Flow Planning

- Mortgage Statement
- Other Loan/Debt Statements
- Current budget

Educational Savings

- College Account Statements

Names, Address, & Telephone Number

- Accountant
- Lawyer
- Insurance Advisor

Your Family's Security

- Life Insurance Statements
- Disability Insurance Statements
- Long Term Care Insurance Statements

Estate Planning - Personal

- Most Recent Will
- Most Recent Power of Attorney

Investment Strategies

- 401k Statements
- All Other Retirement Account Statements
- All Investment Account Statements