



# RETIREMENT TAX ANALYSIS INFORMATION



## 1. BACKGROUND INFO

- ☐ Name(s):
- ☐ Age(s):
- ☐ Planned Retirement Date(s):

Scan to  
Schedule Visit



## 2. DOCUMENTS

- ☐ 2023 Federal Tax Return
- ☐ Recent quarterly investment statements (Brokerage, IRA, 401k, annuities, pensions)
- ☐ Social Security statement from SSA.gov if not yet drawing  
Social Security monthly income, if drawing: \_\_\_\_\_
- ☐ Checking/Savings totals: \_\_\_\_\_  
CDs: \_\_\_\_\_
- ☐ Real Estate holdings (mortgage balance, current valuation)  
\_\_\_\_\_  
\_\_\_\_\_

## 3. PROCESS

- ☐ 1) Schedule in-person (office or home) strategy session or a phone call to discuss your specific situation and concerns
- ☐ 2) Bring this completed sheet and documents to your visit

## 4. ADDITIONAL NOTES:

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