



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:
