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DOCUMENTS FOR FINANCIAL ANALYSIS

- Personal income tax returns--prior two years
- Recent statements of investment accounts including mutual funds, IRAs, annuities.
- Recent statements for pension plans, 401k plans, and other qualified plans
- Policies or summary of coverage statements for life, disability, or long term care insurance
- Recent pay stub
- Recent bank statements
- Mortgage or loan information
- Credit card balances
- Social Security statements
- Wills
- Trusts
- Monthly Budget including annual property tax liabilities
- Social Security numbers and birth dates for all family members
- List of financial goals—financial “wish list”

Securities and advisory services offered through Royal Alliance Associates Inc. member FINRA/SIPC.
Financial Planning and additional advisory services offered through Madison Advisory Services Inc.
Insurance offered through Madison Planning Group Inc. Royal Alliance is not affiliated with either entity