SPECTRUM
FINANCIAL ALLIANCE

Documents to bring to your profile appointment:

- [ ] Investment account statements
- [ ] Retirement account statements including 401(k) and 403(b) accounts
- [ ] Pension estimates, if applicable
- [ ] Annuity statements
- [ ] Life/Long-term care/Disability insurance policy information
- [ ] Home values and information on any real estate holdings
- [ ] Mortgage information
- [ ] Student loan statements
- [ ] Value or appraisal of any significant personal property like boats, automobiles or jewelry
- [ ] Business valuations (if you own your own business)
- [ ] Stock option plans
- [ ] Social Security statements

In doubt about an item? Bring it along.
We can help you sort through the details.

Appointment Date:_______________ Time:_______

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