What to Bring to Your Q&A Session

____ Bank/CD accounts statements

____ Mutual fund and brokerage statements

____ IRAs, 401ks statements

____ Company/State/Municipal or other Pension benefits statement

____ Social Security Benefit Statement (you can get this at www.ssa.gov)

____ Any Life insurance or Long-Term Care insurance policies or statements

____ Any annuities statements (fixed, variable or equity indexed)

____ 2017 tax return or most recent return

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