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*Planning Your
Future One Day
at a Time*

Securities and Advisory Services
offered through Centaurus
Financial, Inc. Member FINRA &
SIPC, a Registered Investment
Advisor.

Carroll Retirement Plans &
Investments and Centaurus
Financial, Inc., are not affiliated.

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Documents Needed For Planning

Please provide copies of the following applicable documents.

All information provided will be treated confidentially.

Most Recent Payroll Stub(s) or Statement of Earnings

Self Spouse

Social Security Statement(s) www.ssa.gov

Self Spouse

Pension Statement(s)/Years of Service www.michigan.gov/ors

Self Spouse

Wills/Trusts

Self Spouse

Divorce Decree(s) and Separations Agreements

Self Spouse

Statements, Contracts, & In-Force Illustrations

- 401(k)
- IRA/ROTH/SEP/SIMPLE
- 403(b) (Tax Sheltered Annuities)
- 457
- 529 Plan
- 401(a)
- Annuities
- Thrift Savings Plan www.tsp.gov
- CDs/Mutual Funds/Savings Accounts
- Profit Sharing Plans
- Disability
- Driver's License
- Life Insurance
- Long-Term Care
- Stocks/Bonds
- Brokerage Accounts
- Real Estate (excluding primary residence)

Approximate Value: \$ _____

We look forward to meeting with you!