



If possible, we ask that you have the following documents available. Don't worry if you don't have everything, we can always fill in the blanks later.

Documents:

- Bank account statements
- 401k, IRA and other investment account statements
- Recent paystub(s)
- Retirement benefit statement or booklet, if applicable
- Social Security statement(s)
- Insurance summaries, if applicable.
 - Life Insurance: Death benefit, premium, policy type.
 - Long Term Care: Policy details from benefit statement page.

*Steve Killiany, CFP®
Managing Partner – Investment Planning
Capitol Retirement Strategies
220 Main St, Suite 200
Gaithersburg, MD 20878
cell (301) 335-1243
office (240) 252-7832
fax (240) 252-7833*

Registered Principal, Securities offered through Cambridge Investment Research, Inc., a Broker/Dealer, Member FINRA/SIPC. Investment Advisor Representative, Cambridge Investment Research Advisors, Inc., a Registered Investment Advisor. Cambridge and Capitol Retirement Strategies are not affiliated.