



P.O. Box 360
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New Market, MD 21774
(301) 865-9740

Information Request Form

In order to create a complete and thorough picture of your current and future financial situation, we will need the following documents from you. This material will be treated confidentially and returned to you as soon as the planning process is completed, or earlier if requested. If you do not have every item on this list, just bring what you can to our first meeting.

- Latest statements from trust companies, brokers, investment companies, and banks pertaining to investments (including checking & savings accounts)
- Latest Pension/Retirement Plan statements from employer(s)
- Latest Social Security Estimate Statements
- Budget of personal and living expenses (see attached)
- Latest mortgage and other loan statements
- Most recent payroll stubs
- State and Federal Income Tax Returns for last year
- All life & disability insurance policies and latest premium notices
- Latest will, power of attorney, and any other legal documents
- Latest statements of minor children's assets
- Any other relevant documentation

If you have any questions, please do not hesitate to contact us at (301) 865-9740.