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## Discussion Topics & What to Bring



### Topics You May Be Interested In

Please check topics which interest you.

- Retirement Planning** - SEP IRA, Simple IRA, 401(k), 403(b), Profit Sharing or Money Purchase Plan
- Major Purchases** - Home Mortgages, Home Refinance & Car Leases
- Insurance** - Long Term Care, Auto, Home, Disability & Health Care
- Budgeting & Debt Consolidation**
- Estate Planning** - Trusts & Wills
- College Investment Planning**
- Tax Planning**
- Caring for Elderly Parents**



### Suggested Items to Bring

- Current Investment Statements**
- Previous Year Tax Return**
- Current Pay Stub**
- Executed Power of Attorneys, Wills & Trusts**