This information helps us keep your financial plans on track and up to date. The more current our information is on your financial position, the better!

The following items might be beneficial to bring along to your review:

- Current Employee Benefit Statement (we want to look at the list of your investment options, as well as your current choices)
- Outside Account Information
- Current Salary Information
- Current Pension information
- Recent Social Security Benefits Statement (you can get this at www.ssa.gov/myaccount)
- Any information regarding changes in your life (new mortgage, job, accountant, attorney, will, trust, insurance, etc.)

As a reminder, we are here to answer any questions or handle any concerns- so please let us know if there is something you'd like us spend a little bit more time discussing during this review!

Blue Hills Wealth Management
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