



Wisconsin Retirement Council™

Pension and Retirement Strategies

Documents Needed

The following documents will be needed to properly study, analyze, and prepare a personal game plan for you. If you do not have this important information when we meet, we will need to get it at some point after our initial meeting. This material will be treated confidentially and returned when the process is completed, or earlier if requested. I do realize that some of the following items may not apply to you at this time. The more information you give us on your financial situation, the better!

- Most recent income tax returns – 1040 taxes, pages 1 and 2.
- Latest statements from mutual funds, stocks, bonds, CDs, etc. (including current values and cost basis).
- Latest annuity account statements.
- Copy of the most current WRS Member Statement of Account – usually mailed in April (WRS phone number is 1-877-533-5020)
Years of Service: Before 2000: _____ After 1999: _____ Total: _____
Money Purchase Balance: _____
- Copy of the most current tax deferred accounts (403b, TSA, IRA, 401k, 457 and Roth IRA).
- Copy of the most current pay stubs (educator and spouse).
- Employee Benefit booklets.
- Latest Life Insurance statements (Type of policy, face amount, cash values).
- Disability Income insurance policy information.
- Social Security statements.
- Estate Planning Documents (Wills/Trust Agreements).
- Loan information (car, home, credit cards, student loans – original amount borrowed, interest rate, balance due, current value). See Personal Information Checklist!
- General Information
 - Personal information, address, birth date, social security number, etc. See Personal Information Checklist.
 - Goals concerns, objectives for retirement, planned retirement dates, such as:
 1. Age for retirement: _____
 2. Monthly income desired for retirement: _____ (today's dollars)
 3. A rate of inflation you expect in the future: _____%
 4. A rate of return you expect on your investments: _____%
 5. Gifting Plans – Charitable , Personal, Family _____%

If you have any questions regarding any of the listed items, please call our office at (877) 854-3535. Our team will be happy to assist you!

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