What to Bring to Your Financial Planning Appointment

In order for us to make the most effective use of your time, it would be helpful if you could bring the following documents with you and be prepared to discuss:

- A copy of your driver's license
- Checking, savings or certificate of deposit statements
- Individual Retirement Accounts (IRA's) most recent statements
- Company retirement plan statements
- Mutual fund account statements
- Current balances, current interest rates & monthly payments on any consumer loans (cars, boats, school, ect.)
- Any other liabilities or debt statements
- Social Security earnings statement
- Monthly budget

I look forward to meeting with you and making sure you are financially fit!
If you have any questions in the meantime, please call me at (303) 424-8757

Sincerely,

Leann Canty,
President
Canty's Financial Strategies, Inc.
Enrolled Agent