JAMES INVESTMENT GROUP INC.

Recommended Documents
Meeting Preparation

Documents
The following list is a suggestion of documents you may want to share with us to help maximize our time together. (Some of these may not be applicable.)

- **Bank, Brokerage and Retirement Account Statements**
  - Retirement Accounts: TIAA-CREF, 403(b), 401(k), IRAs
    - Please include details regarding contributions and employer matching, if applicable
  - Brokerage Accounts: e-Trade, Vanguard, Fidelity, Schwab, etc.
- **Pension and Annuity Statements**
- **Social Security Statements**
  - Including yourself and your spouse, if applicable (current, former, or deceased)
- **Mortgage Statement or Home Equity Loan Documents**
  - Please include details regarding home value, remaining mortgage term, and a breakdown of interest, principal, insurance and tax costs
- **Life & Long-Term Care Insurance Policy Statements**
  - Please include details regarding premiums, death benefit & cash value
- **Recent Tax Return**
- **Documentation of any outstanding loans or obligations**
- **Income Estimate (net/gross; monthly/annually)**
  - Please include any rental income, alimony, royalties, farm income, etc.
- **Budget or estimated monthly living expenses**

Document Delivery
If you choose to share information with us, you may do so in any of the following ways:

- **Bring documents along to your appointment**
- **Deliver documents to our office prior to your appointment**
- **Submit documents electronically via fax or encrypted email**
  - Please contact us prior to transmitting information via fax or email so we may plan accordingly to keep your information secure

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