



CALANDRA

FINANCIAL

WHAT TO BRING TO YOUR VISIT:

(please bring all that apply)



Investment Statements

- Brokerage Statements
- 401(k), 403(b), 457 Statements
- CD / Money Market



Insurance Policies and Statements

- Medicare Supplement
- Long-term Care
- Life Insurance
- Annuity Statements



Social Security Projection / Amount (if applicable)