SAFFRON
CAPITAL & TECHNOLOGY

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What to Bring

- **Income Information**: Most recent pay stubs or recent W-2 or 1099. This details your income and deductions or expenses.
- **Current Bank Statements:** Checking, savings, and money market accounts.
- **Current Investment Statements:** Brokerage accounts, mutual funds, stocks, retirement plans, etc. This information will allow us to analyze your investments and make certain that they match your goals and risk tolerance.
- **Recent Tax Returns:** Tax return with all schedules and/or statements. Your income tax return helps us determine your tax efficiency.
- **Loan Information:** Mortgages, student loans, credit cards, etc. We need to know about any outstanding debt/loans so we can discuss payoff or payments.
- **List of Assets:** Any other items of value which are not included on account statements, including real-estate assets, other hard assets or private equity interests.
- **Budget Expense or Spending Information:** Quickbooks reports, Mint.com screen prints, American Express statements, back of the envelope numbers. How you spend your money tells us what you value and what long-term spending strategies may be appropriate.
- **Estate Documents:** Wills, trusts, powers of attorney. Any estate documents that you have had drawn up.
- **Life and Disability Insurance:** Policies or recent statements. We will review amounts and terms of policies.
- **Property and Casualty Insurance:** Declaration pages for your home, auto, boat, jewelry, umbrella, and any other policies on your things.
- **Health and Long-Term Care Insurance:** Benefit summaries, premiums, deductibles and co-payment information will assist us to refine your budget expense and long-term spending plans