RETIREMENT WEALTH

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Document List

So that we may determine your financial "big picture" please provide copies of the most recent, **detailed** account statements listed below:

CDs

IRAs

Mutual Funds

Annuities

Life Insurance Polices

Retirement Plans

Please also include a copy of any wills and other estate planning documents.

Note: Due to the sensitive nature of the information you are sharing, please do NOT attach the above-referenced documents to an email. Either mail them to our Raleigh, NC address or upload them via the secure Sharefile link below:

https://lawsonfinancialgroup.sharefile.com/r-r2db35b633cb4e18b

This link is also available below the signature line of our email.