



LOYOLA BLUEPRINT DOCUMENTATION LIST

Please provide us with the following documentation so that we may more accurately prepare your financial blueprint.

_____ Estimate of Social Security Benefits

_____ 403(b) Statement(s) / 401(k) Statement(s) / 457 Statement(s)

_____ Roth IRA Statement(s)

_____ LUERP Estimate (if applicable)

_____ Current Statement for any other Financial Account(s) – mutual funds/brokerage accounts/annuities, etc.

_____ Bank Statements / Certificate of Deposit Statements

_____ Current Statement for any other Retirement Account(s)

_____ Copy of your Pay Stub(s)

_____ Mortgage Statement(s)

_____ Cash Flow and Expense Worksheet (Optional)

Visit www.infinityfinancial.org to download this document.

Should you have any questions, please call our office at (708) 410-0400. Thank you.

Investments are not NCUA insured. There are no Credit Union guarantees. Investments may lose value.

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