



## RUSH OAK PARK HOSPITAL BLUEPRINT DOCUMENTATION LIST

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

\_\_\_\_\_ Social Security Benefit Statement or simply provide us with your benefit amount.

\_\_\_\_\_ 401(k) Statement(s)

\_\_\_\_\_ Roth IRA Statement(s)

\_\_\_\_\_ 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)

\_\_\_\_\_ Mortgage Statement(s)

\_\_\_\_\_ Cash Flow and Expense Worksheet (Optional)

Download this document from [www.infinityfinancial.org](http://www.infinityfinancial.org).

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

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