COURTS FINANCIAL STRATEGIES

Personalized Tax Planning and Preparation Services

Courts Financial Strategies (CFS) Available Exclusively to Members of PCM Credit Union

Step One:

After contacting CFS and signing up for Personalized Tax Planning, your first step will be a comprehensive data collection and discovery appointment. This will allow for a thorough review of your current tax situation, along with the opportunity to learn how you may save money in the future.

You will need the following documents for this appointment:

- ☐ Last year's tax return and source documents (unless on file)
- ☐ Most recent W-2s and paycheck stubs
- ☐ Investment account statements (mutual fund, brokerage, annuity, employer stock options statements, etc.)
- ☐ Retirement account statements (401 (k), 403 (b), IRAs, etc.)
- ☐ College savings plan statements
- ☐ Estimate of Social Security benefits
- ☐ Estimate of projected annual pension benefits
- ☐ Insurance policies (Life, Health, Disability, Supplement, LTC)
- ☐ Home mortgage statement
- ☐ Bank/Credit card statements
- ☐ Wills and other estate planning documents

Step Two:

Schedule a second appointment to discuss your Personalized Tax Plan.

Most plans have a central planning theme:

Retirement Income, Taxes, Social Security, Healthcare, Investments and Estate Planning
Personalized to your goals, objectives and resources!

Call Kenneth Courts at 262.510.2226, to make your appointment!

Kenneth Courts
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