



# 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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