

McILRATH | ECK

INVESTMENT - RETIREMENT - LEGACY PLANNING

IN PREPARATION

To make the most of your time during the initial consultation meeting, please provide *recent* copies of the following:

- Bank, Brokerage, and Annuity Statements
- Retirement Plan Statements:
 - i.e. 401(k), 403(b), Pension Plans, etc.
- Social Security Statements
 - You can generate your own statement online by visiting their website at:
<https://www.ssa.gov/retire/estimator.html>
- Tax Returns
- Declarations pages of Insurance Policies:
 - Life, Long Term Care, Home and Auto (Policy coverage and premiums)
- Employer Life Insurance Policies

DIRECTIONS TO OUR OFFICE

Arlington office

3325 Smokey Point Dr., Ste 201
Arlington, WA 98223-7083

360.657.8600

888.248.5077 – toll free

www.mcilratheck.com

If you have any questions or need to reschedule, please contact our office.

From Interstate 5, take exit 206 - (172nd / Smokey Point / Arlington Airport). Go east on 172nd Street NE one block, turning left (north) on Smokey Point Blvd.

Drive 1/4 mile to Smokey Point Dr. (intersection past Skagit Valley Health Connections, and turn left. We are located in the second building (named **Professional Services Center**) on the right. It is a two-story glass and brick bldg.

