LGFCU LOCAL GOVERNMENT FEDERAL CREDIT UNION | Personal Financial Planning

CONTACT INFORMATION FORM

Congratulations on taking the first step towards a better financial future! To get started, we need a few items from you to help us understand your financial situation. We'll call you within 24 to 48 business hours to confirm receipt of your information.

Your Contact Information

Name:____________________

Phone:____________________

Other Phone (optional):____________________

Email:____________________

☐ I verify I'm an LGFCU member

I'm interested in: (check all that apply)

- ☐ Budget Review
- ☐ Credit Report Review
- ☐ Debt Reduction Review
- ☐ Savings Review
- ☐ Education Financing Review
- ☐ Retirement Planning
- ☐ Investment Planning
- ☐ End-of-Life Planning

Using the checklist on the next page, gather copies of your financial statements, then fax or mail them along with this contact information form to us. For security, please do not send your financial documents by email.

Fax To: 919.647.9317
ATTN: Financial Planning

Number of pages including cover sheet:_______

Mail LGFCU Financial Planning
1330 St. Mary's Street, Suite 500
Raleigh, NC 27605

You have our assurance this material will be treated confidentially.

FINANCIAL DOCUMENT CHECKLIST

Use this checklist to prepare for your consultation. Based on the services you're requesting, gather the two most recent copies of the documents listed below.

Financial Statements
The following items are needed for the Budget Review, Credit Report Review, Debt Reduction Review, Savings Review and Education Financing Review.

- ☐ Payroll or other income statement(s)
- ☐ Checking account statement(s)
- ☐ Savings / money market / certificate of deposit (CD) statement(s)
- ☐ Debt statement(s) (e.g. mortgage, home equity, auto, credit card, personal loan, etc)
- ☐ Credit report* (One copy for credit report review or debt reduction service **only**)

A free copy of your credit report is available once a year from each of the three credit bureaus (Equifax, Experian or TransUnion) at **www.annualcreditreport.com.*

Retirement and Investment Statements
If you are requesting a retirement or investment plan, the following documents are all you need to provide.

- ☐ Savings / money market / certificate of deposit (CD) statement
- ☐ 401(k), 403(b), 457, Traditional IRA, Roth IRA, SEP or retirement statement*
- ☐ Pension or profit-sharing statement
- ☐ Monthly or year-end mutual fund statement
- ☐ Monthly or year-end brokerage account statement
- ☐ Social security statement
- ☐ Annuity statement
- ☐ Insurance policies (One copy of each for insurance review **only**)

**Specific questions regarding pension plans or other employer-sponsored retirement plans should be directed to your benefits administrator. LGFCU is not affiliated with any government-sponsored retirement system and does not have access to that information.*

Sending your documents to LGFCU
Once you have gathered your financial documents, please fax or mail them, along with the first page of this document, to LGFCU Financial Planning. We will call you within 24 to 48 business hours to confirm receipt of your information.

You have our assurance this material will be treated confidentially.

If you have questions while gathering your documents, call **877.367.5428** or email **financialplanning@lgfcu.org**.