Statements

Helping smart people make smart financial decisions

INCLUDE THE MOST CURRENT STATEMENT FOR EACH OF YOUR ACCOUNTS.

Current can be monthly, quarterly, or annually. When you receive your next statement, you can remove the old one. If you use a paperless system and are receiving statements electronically, we suggest you print out at least a year end copy to be inserted into this binder.

Here are some examples of accounts you may have that should be included in this section:

- *Employer retirement accounts such as 401(k), 403(b), 457(b), deferred comp, etc.*
- *Individual retirement accounts such as IRAs, Roth IRAs, Simple or SEP IRAs, etc.*
- *Checking accounts statements*
- *Savings accounts statements*
- *Money market accounts statements*
- *Mortage, home loan or home equity line of credit statements*
- *Student loans*
- *Credit card accounts statements*
- *Other debits*

1749 S. Naperville Rd. Suite 206, Wheaton, IL 60189
Phone: (630) 681-0700 Fax: (630) 384-1065
www.timothyfinancial.com