

Active and Retired GM Employees with PSP - Buyout

In an effort to complete an individual financial plan within the time frame of your appointment; we are asking you to submit your financial information listed on this letter, at least **one week prior** to your meeting with Kathy Colby. This will allow for more time to discuss your needs.

- Bank account or CD statements
- Investment statements
- Online user names and passwords
- Typical paycheck stub
- Pension statements or projected benefits before and after age 62 (when supplement ends)
- Life insurance policies and annual statements
- Long Term Care policies and annual statements
- Recent Federal and State tax return including all supporting documents
- Mortgage payment amount and time remaining – NOT including escrow
- All debt balances, interest rates, payment amounts, time remaining
- List of savings bonds
- Wills, Trusts and Powers of Attorney
- Social Security estimate or annual October statement (Depending on your age you may not be receiving printed estimates in the mail. You will need to establish an account online with the Social Security office at www.ssa.gov to print your current information.)

Instructions for requesting GM Pension Estimate:

Via Internet: Go to www.GMbenefits.com and print a copy of your pension estimate.

Via Telephone: You will need the following information when you call for your GM Pension Estimate:

- Your social security number
- Your spouse's date of birth

Call 1-800-489-4646 – Follow voice prompts to speak to a customer service representative. When speaking with the representative, please request a pension estimate.