Checklist for
Financial Planning

Please bring the following materials to our meeting:

- ❑ Current Bank, Savings, Investment, and Retirement Account statements
    - o Checking Account(s)
    - o CD, Money Market, and Savings Accounts
    - o Brokerage and Mutual Fund Accounts
      (*include listing of stocks and bonds not held in brokerage accounts*)
    - o Fixed and Variable Annuities
    - o IRAs, 401(k), 403(b), 457, Profit-Sharing Plan, or any other Retirement Plans
- ❑ Recent Paystub
- ❑ Pension and other Employer Benefits statements
- ❑ Social Security Benefits statement
- ❑ Current Mortgage and 2nd Mortgage statements
- ❑ Current Car Loan, Student Loan, and other Loan statements
- ❑ Current Credit Card statements
- ❑ Estimate of your Household Budget
  (income and expenses – *not required in written format*)
- ❑ Tax Return from last year
- ❑ Insurance policies (life, disability, long-term care) *and* current statements
- ❑ Wills, Trusts, Divorce Agreement, Advanced Directives, Powers of Attorney (POAs), and any other relevant Legal documents

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