

## Financial Planning Checklist

To help us create a retirement plan, please gather the following documents.

**Retirement plan statements:**

- Statements outlining the value of retirement plans offered by your employer such as:
  - Defined benefit pension plan
  - 401(k) or 403(b)
  - Profit sharing plans
  - IRA, Roth IRA, SIMPLE IRA, or SEP IRAs
  - Annuities
- Current contributions to your retirement plan and employer match (if applicable)

**Most recent statements for all investment/brokerage accounts outside of Baird**

**Amounts and interest rates on all debt such as mortgage, credit card, car loans, etc.**

**Social Security benefit estimate(s)**

- These can be found at [www.ssa.gov](http://www.ssa.gov)

**After tax spending estimate**

- How much income do you need each month or year in retirement to cover all expenses

**Copy of your most recent tax return**

**Most recent statements for all life insurance policies (if applicable)**

**Pension information (if applicable)**

- This includes income payments, survivorship percentage, and COLA (Cost of Living Adjustment)

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