

MILNE FINANCIAL PLANNING

An Independent *Fee-Only* Advisor

Name: _____

Birthdate: _____

Desired Retirement Age:

The following, though not necessarily a complete list, will enable us to quickly see your overall financial picture. If you cannot find or don't have some of these items, we can track them down later.

Account Statements:

- Retirement, 401k, 403b, IRA etc.
- Investment options for your 401k, 403b
- Investment / Brokerage
- Mutual funds
- Bank, Checking, Savings, CDs.

Insurance:

- Life (Original policy)
- Health
- Disability
- Long-term Care
- Homeowners/Auto
- Work Benefits
- Pension Estimates or Payments

Estate and Other Documents:

- Wills
- Durable Power for Health Care
- Living Will
- Trusts
- Tax Returns, 2 years
(full returns with all pages, no photos please)
- Property Tax Bill
- Mortgage Statement
- Home Equity Balance
- Auto Loan Statement
- Credit Card Statement
- Social Security Estimates or Payments
- Divorce Decree/QDRO Documents
- Other helpful information & documents

DREAMS and GOALS: Take a couple of minutes to answer the following questions

1. What questions are you looking to have us answer?

- _____
- _____
- _____

2. What are your top goals you would like to accomplish in life? (does not have to be financial related)

- _____
- _____
- _____

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