

Checklists



HOLISTIC FINANCIAL PLANNING
WEALTH MANAGEMENT
ADVICE

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NOTES

Financial Responsibilities

ITEMS TO INCLUDE

- ☐ Household Budget
- ☐ Checking Accounts
- ☐ Savings or Money Market Accounts
- ☐ Credit Cards (including those with no balance)
- ☐ Mortgages
- ☐ Car Loans
- ☐ Student Loans
- ☐ _____
- ☐ _____
- ☐ _____

Notes



Your Assets

ITEMS TO INCLUDE

- ☐ Retirement Investment Accounts
- ☐ Non-Retirement Investment and Bank Accounts
- ☐ Employer Provided Investment Accounts
- ☐ Pension Statements
- ☐ Social Security Statements
- ☐ Information about Real Estate Owned

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Notes



Insurance and Other Benefits

ITEMS TO INCLUDE

- ☐ Life Insurance Policies
- ☐ Long Term Care Insurance Policies
- ☐ Disability Insurance Policies
- ☐ Summary of Employer Provided Insurance
- ☐ Homeowner's Insurance Declarations Page
- ☐ Auto Insurance Declarations Page
- ☐ Umbrella Liability Insurance Declarations Page
- ☐ Home Inventory Checklist
- ☐ VA or Government Benefits
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Notes



Important Documents & Passwords

ITEMS TO INCLUDE

- ☐ Copy of Will
- ☐ Copy of Medical Directives
- ☐ Copy of Trust
- ☐ Power of Attorneys
- ☐ Copy of Birth Certificates, Marriage Certificate, Passports
- ☐ Copy of Deeds and Titles
- ☐ Copy of Employment Contact
- ☐ Business Documents
- ☐ Password list

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Notes



Financial Plan

ITEMS TO INCLUDE

☐ Current Financial Plan

☐ Previous Plans

☐ _____

☐ _____

☐ _____

Notes

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