Financial Plan Meeting Preparation

Things to do Prior to our Meeting:

Link External Accounts to Baird 360 Wealth

Brokerage accounts, 401(k)s, IRAs, 529 plans, savings accounts, etc.

360 Wealth gives you a secure, comprehensive view of your total wealth all in one place right on Baird Online. By linking your non-Baird accounts, we can ensure your financial plan is as up to date and accurate as possible.

Log into Baird Online at https://bol.rwbaird.com/Login and click on the "360 Wealth" tab to get started.

Things to Bring with You:

- Social Security Statement
- Statements of Other Assets
  Homes, personal property, rental property, collectibles, any assets not linked to 360 Wealth
- Statements of Liabilities
  Statements showing balance, interest rate, maturity, & monthly payment
- Insurance Policies
  Life, long-term care, and disability
- Current Contributions
  401(k)s, IRAs, savings accounts, etc.
- All Sources of Income
  Salaries, pension plans, trust funds, rental income, etc.
- Estate Planning Documents
  Wills, trusts, POAs, Healthcare POAs, beneficiary designations, etc.
- Federal Tax Return
- Estimated Living Expenses
  See attached budgeting worksheet

The Oldham White Monroe Group
707 Vail Street
Princeton, IN 47670
812-385-3323