



Items Needed for Financial and Retirement Analysis

- Desired Retirement Income** - Provide us with the net amount you desire each month. Income should be in today's dollars (we will adjust for inflation).
- Monthly Budget** - Budget should include all routine incomes and expenses. Goal is to find your net income after expenses.
- Retirement Age** - At what age do you plan to retire? If retired, what age did you retire?
- Tax Returns** - Need tax returns for the past two years.
- Insurance Policy Statements** - Life Insurance, Long Term Care and Disability Insurance, including Group Benefits at work for both of you. Provide details of coverage: How much? How long?
- Employer Retirement Statements** - Statements detailing account values, % of salary contributing, employer match %, employer maximum % (Example: Employer matches 100% of employee's salary up to 5% per year).
- Other Investment Statements** - Statements detailing account values, investment holdings, and annual contributions for all accounts held outside of Full Cup Financial.
- Pension Information** - If you will / do receive a monthly pension from any current or past employers, provide the annual income. Provide a statement of benefits, if available.
- Social Security Statements** - Latest statement showing your estimated benefit at your Full Retirement Age.
**To find your latest statement, you can get them online at www.ssa.gov or call 1-800-772-1213.*
- Real Estate** - Do you own or rent? If you own property, provide the estimated market values, original loan amounts, annual interest rates, loan terms (in length), and how many payments you make per year and first payment dates.
- List of Liabilities** - Include all liabilities (cars, credit cards, student loans, medical, etc.). Provide the balances, interest rates, minimum required payments, and the payment you are currently making.
- Large Expenditures Anticipated** - If you plan to make home improvements, buy automobiles, pay for a wedding, etc., and provide estimated cost and the anticipated date of expenditure.
- Inheritances** - Conservative estimates of any inheritance you may receive. Provide the estimated value and the anticipated date of inheritance.
- Property and Casualty / Home and Automobile Insurance Declaration Pages** - Provide a summary of coverages. How much is your liability, uninsured motorists, and your umbrella policy coverage?
- Estate Plan / Wills** - Provide your wills and/or any original estate plan documents.

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