Du Charme
WEALTH MANAGEMENT

Data Gathering Checklist

With the following information we can put together a personalized plan for you to be able to achieve stress free financial security.

Information We Like To Discuss

- Age
- History with money and finances
- Present income and projected future income
- Current and future needs
- Short, mid and long-term goals
- Projected expenses
- Assets and liabilities
- Household dependents
- Health or other concerns that may impact your finances or insurability

Documents We Like To See

- Tax return and W-2 from previous 2 years
- Bank statements
- Loan, debt and mortgage information
- Employer pay stubs and work benefit information
- Insurance statements/policies
- Investment statements
- Household budget
- Social Security statements
- Estate planning documents
- Other important information (alimony, child support agreements, etc.)

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