

Financial Plan Checklist

Items to Provide:

Investment Accounts Held Outside Baird

- Current statements showing value and holdings (stocks, bonds, mutual funds, retirement plans, etc.)

Bank Accounts

- Current statements showing value and holdings

Tax Return

- Copy of most recent tax return

All Other Assets

- Current statements, if available, showing value for home, rental property, etc.

Liabilities

- Current statements showing remaining balance due, payment amount, interest rate, and expected final payment date for debts, such as credit cards, mortgages, loans, etc.

Life Insurance Policies

- Life, long-term care, etc.

Social Security Information

- Go to: www.ssa.gov. Click Sign in/up > my Social Security > Create an account to obtain a copy of your Social Security statement

Current Contributions

- 401(k), 403(b), IRAs, savings accounts, etc.

Annuity Information

- Current statements showing value, cash flow, income, savings, etc.

All Sources of Income

- Gross salary, pension plans, trust funds, rental income, etc.

Estate Planning Documents

- Copies of any of the following: Will, Trusts, Advance healthcare directive (AHCD) / living will, Financial Power of Attorney, Titles & Property Deeds, Guardianship Designations

Questions We May Ask:

What has recently changed?

- Career change, life event, etc.

What are your financial goals, dreams, and purpose for your money?

- Travel, new cars, boat, vacation home, home improvement, etc.

How much money will you need to live on in retirement?

- Complete attached budget worksheet

What are your liquidity needs, risk tolerance, time horizon, investment objective, etc.?

When do you want to retire?

Below are options for sending documents and statements:

- Securely upload the documents and statements utilizing the Document Exchange feature on Baird Online under the Documents tab.
- Link your outside accounts via Baird 360 Wealth online, which automatically syncs with our retirement planning software. Once linked, providing a statement is typically not necessary.
- Ask us to provide a secure email for which you can use to reply and attach your documents.
- Mail or drop off your documents to our office:

Baird
Attn: The Schnur McCance Group
99 West Sunbury Road, Suite 100
Butler, PA 16001

The Schnur McCance Group

724-283-3788

schnurmccancegroup.bairdwealth.com