Brand Financial Services
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Financial Planning Checklist

How to Prepare for Your Meeting

Things to bring with you

- **Investment accounts** . Current statements showing value and positions (stocks, bonds, mutual funds, CDs, money markets, etc.).
- **Bank accounts**. Current statements showing value and positions (CDs, money markets, etc.).
- **List of your other assets**. Homes, personal property, rental property, collectibles, etc.
- **List of your liabilities**. Debts, mortgages, loans, etc.
- **Social Security information**. Statements you may have received with an estimate of earnings at retirement.
- **Current contributions**. 401(k)s, IRAs, savings accounts, etc.
- **All sources of income (present and future)**. Salaries, pension plans, trust funds, rental income, etc.
- **Insurance and annuity policy information**. Life insurance, long term care, disability, annuity statements and policies, etc.
- **Your calendar**. We'll need to schedule your next appointment.

Questions We Will Ask You

- When do you and your spouse/partner want to retire?
- How much money will you need to live on during retirement?
- What are your goals? Travel, new cars, boat, vacation home, etc.
- Do you anticipate any inheritances?

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