

Items Needed to Prepare your GamePlan

1. A driver's license, passport or other government-issued photo ID (The U.S. Patriot Act requires us to verify the identity of all clients as part of the government's efforts to combat terrorism and money laundering.)
2. Recent statements for all financial accounts, including:
 - Checking & Savings Accounts
 - CDs
 - Money Market Funds
 - Mutual Funds
 - Tax-Deferred Annuities
 - IRAs and other retirement/pension accounts
 - Trust or Managed Accounts
 - Information on real estate, including
 - Current value
 - Type of mortgage, interest rate, remaining balance
3. Employer booklets describing employer-provided:
 - Insurances
 - Retirement Plans
4. Education Savings Plans (i.e., 529s, Prepaid Tuition, etc.)
5. Any other employee benefits, such as stock options or deferred compensation plans.
6. Operating or Partnership Agreements for any business you have an ownership interest in.
7. Insurance Policies or Declaration Pages for:
 - Life
 - Disability
 - Long-Term Care
 - Automobile
 - Home (Flood, Windstorm, Liability)
 - Umbrella
8. A copy of your latest Business and Personal tax return.
9. A list of any other financially-valuable assets not mentioned above
10. A list of debts, including interest rate and amount owed, for such debts as:
 - Credit Cards
 - Auto Loans
 - Personal Loans
 - School Loans
 - Other
11. A working or detailed knowledge of your current financial budget.
12. Copies of Wills, Trusts and other Estate Planning Documents.