

Financial Planning Document Checklist

In order to provide the most comprehensive analysis possible, please bring the following information to our meeting. *Advisor will check all that apply.*

Investment and savings statements

- Bank account statements
- Account statements for any investments you own
- Employment benefits statement
- Retirement/401(k) plan statements

Income and cash flow information

- Most recent federal and state income tax returns
- Pay stubs
- A list of future funding requirements: second home, college expenses, etc.

Documents related to your debts

- Mortgage information (rate, term, fixed or variable)
- Credit card statements
- Student/other loan statements
- Auto loan statement

Estate planning information

- Current will or trust

Other legal documents

- Property or investment agreements
- Pre-nuptial agreements/divorce settlements
- Property settlement agreements

Insurance policies

- Life insurance policies
- Disability insurance policies
- Long Term Care insurance

Family Information

- Account statements for children's investments if applicable
- Care information for parents if applicable

Prepare to discuss

- Please come prepared to identify your short and long term financial goals.

