SecondHalf Coach Wealth Management

2519 Ligonier Street
P.O. Box 421
Latrobe, Pa 15650
(724) 537-2799
Fax: (724) 537-3180
info@shcwealthmanagement.com
www.shcwealthmanagement.com

Initial Financial Meeting Document Checklist

Please bring any of the following items that apply to your specific financial profile to our first meeting:

	Subject	Source
☐	**Income**	Most recent tax return.
☐	**Retirement**	Most recent plan statements for IRA, Roth IRA, 401(k), 403(b), Keough, SEP IRA, Simple IRA, RRSP, TSA, annuities, pension statements/options and/or any other employer sponsored plan.
☐	**Savings**	Most recent statements from bank accounts, money markets, CD's and credit unions.
☐	**Non-Retirement Investments/Brokerage Accounts and Stock Options**	Most recent statements detailing stocks (including both stocks you've purchased and options you have not yet exercised), variable and fixed annuities, bonds and mutual funds. Cost basis, if known or available, should also be provided.
☐	**Risk Assessment**	Policies or contracts for life, disability, long-term care and medical insurance.
☐	**Real Estate**	Appraisals, loan information or statement for your primary residence, as well as vacation and investment properties.
☐	**Collectibles**	Appraisals of current market value for precious metals, art and other collectibles.
☐	**Business Ownership**	Current and previous four years of balance sheets and profit-and-loss statements, as well as buyout agreements and a business valuation/appraisal if you have one (include value of stock if publicly traded).
☐	**Inheritance**	A copy of the trust, will or other document detailing your inheritance if available. If not available, and the inheritance is certain, detail specifics on a piece of paper and include it.
☐	**Estate Plan**	A copy of your own will, trust, power of attorney or other documents detailing what you wish to be done with your assets and liabilities when you die.
☐	**Expenses**	Complete the enclosed expense sheet.
☐	**Photo ID**	Current Driver's License or state ID card.