



## Items Needed for Financial Analysis

- Personal Financial Data Form** (form provided to you by Full Cup Financial, LLC)
- Desired Retirement Income** - in today's dollars  
The total monthly income you would like to have when you retire. We will consider any pensions, Social Security benefits, withdrawals from retirement plans, etc. Use today's dollars and we will adjust for inflation. If you have a budget, please provide it. If not, we can help you derive a figure based on your current take home pay.
- Monthly budget** - if you have a detailed budget. If not, we will just use the desired monthly retirement income as your budget
- Retirement age** - If you do not plan to retire, then we can use the traditional age of 65 because your health could force retirement and we need to plan on some date even if we keep working.
- Tax returns** - for last 2 years. Personal and Business if applicable
- Insurance** - policy statements and details including Insurance, Long Term Care and Disability Insurance, including Group Benefits at work for both of you including Life Insurance, Disability Insurance, Long Term Care, etc.
- Retirement Plans** - Please provide copies of actual account statements (all pages) rather than Internet print outs
- Pension information** - will you receive a monthly pension from any of your past or current employers? Please provide the source and the monthly pension amount a
- Social Security Statements** - or summary information. If you do not have the last ones that were mailed, you can get them on line at [ssa.gov](http://ssa.gov) or call 1-800-772-1213
- Real estate** - values and rough estimated cost basis
- Mortgages** - balances and **other debt**
- Any large expenditures anticipated** - in the next few years. Home improvement, automobiles, etc.
- Inheritance** - conservative estimate of any inheritance you may receive
- Any other investments** - or assets which may be utilized/liquidated for retirement income in the future. This includes checking and savings accounts along with other investments.
- Property and Casualty / Home and Automobile Insurance** - declaration pages and/or summary of coverages. How much is your Liability coverage, Uninsured Motorists, and your Umbrella Policy
- Estate Plan / Wills**- Provide your original estate plan documents
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