SUMMIT

WEALTH MANAGEMENT

A Comprehensive Financial Planning Group

Information Needed for Comprehensive Financial Plan

- ❑ Medical/Long Term Care Policy
- ❑ Life Insurance Policies (In-force Illustrations if Applicable)
- ❑ Disability Insurance Policy or Information on Group Plan at work
- ❑ Liability limits on Auto/Homeowner's Policies
- ❑ Current Statements: (Roth IRAs, IRAs, 401K, Investments, Savings, Money Market, Profit Sharing, Stock Options, Stock Purchase Plan, etc.)
- ❑ Social Security statements (sent annually by Social Security Administration)
- ❑ Current Pay Stubs
- ❑ 401K/Employee sponsored plan information and investment choices
- ❑ Pension Benefit information booklet/Estimated benefit at retirement
- ❑ Spending Plan Expenses
- ❑ List of debts with balance, interest rates, and monthly payment
- ❑ Most recent federal and state tax returns
- ❑ Copy of Will or Trust

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