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What We Need to Create Your Financial Plan:

- **Estimate of Your Monthly Expenditures**
- **Copy of recent statements** (any of these that apply):
 - Bank Accounts for the last three months
 - Credit card statements if you do not pay them off every month
 - Brokerage Accounts
 - Mutual Fund Statements
 - Mortgage statements (including interest rate, loan balances & payment)
 - Retirement account statements
 - IRA; 401(k); TSA; 403(b); 457; Keogh; SIMPLE IRA; TSP
 - Pension estimates from employers, STRS, PERS, FERS, etc
 - Social Security statements (all four pages) may be obtained from www.ssa.gov/my/account
- **Tax Returns for past two years** (both personal and corporate if applicable)
 - Current P&L and balance sheets if you are a business owner
- **Living Trust, Durable Power of Attorney for Health Care, or Wills**
- **Insurance Policies**
 - Homeowners
 - Auto
 - Liability
 - Health, Medicare Supplements, Health Savings Accounts
 - Disability
 - Long-term care
 - Life Insurance
 - Umbrella Policy
- **Property Information** (any and all properties owned)
 - All mortgage statements
 - Addresses of property
 - If a rental property, rental income, expenses, etc.
- **Benefits booklet from employer** (if you are currently employed)
- **A List of your contact information**
 - Your Personal Information – phone #'s, email, addresses, etc
 - Contact information for your other advisors (ie. CPA & Attorney)

(If this takes you more than thirty-minutes to gather the information, you are working too hard. Come with what you have. We can get the rest later if necessary.)