Financial Planning Checklist

How to Prepare for Your Meeting

Things to Bring With You

- ☐ **Investment accounts (excluding Avantax accounts).** Current statements showing value and positions (stocks, bonds, mutual funds, CDs, money markets, etc.).
- ☐ **Bank accounts.** Current statements showing value and positions (CDs, money markets, etc.).
- ☐ **List of your other assets.** Homes, personal property, rental property, collectibles, etc.
- ☐ **List of your liabilities.** Debts, mortgages, loans, etc.
- ☐ **Social Security information.** Statements you may have received with an estimate of earnings at retirement.
- ☐ **Current contributions.** 401(k)s, IRAs, savings accounts, etc.
- ☐ **All sources of income.** Salaries, pension plans, trust funds, rental income, etc.
- ☐ **Insurance and annuity policy information.** Life insurance, long term care, disability, annuity statements and policies, etc.
- ☐ **Your calendar.** We'll need to schedule your next appointment.

Questions We Will Ask You

- ☐ **When do you and your spouse/partner want to retire?**
- ☐ **How much money will you need to live on during retirement?**
- ☐ **What are your goals?** Travel, new cars, boat, vacation home, etc.
- ☐ **Do you anticipate any inheritances?**