Financial Planning Document Checklist

In order to provide the most comprehensive analysis possible, we ask you to gather all the financial information you can. The information you provide will determine how comprehensive the financial plan will be.

**Investment and savings statements**

 Bank account statements

 Account statements for any investments you own

 Employment benefits statement

 Retirement/401(k) plan statements

**Income and cash flow information**

 Most recent federal and state income tax returns

 Pay stubs

 A list of future funding requirements: second home, college expenses, etc.

**Documents related to your debts (amounts you owe)**

 Mortgage information

 Credit card statements

 Student/other loan statements

 Auto loan statement

**Estate planning information**

 Current will or trust

**Other legal documents**

 Property or investment agreements

 Pre-nuptial agreements/divorce settlements

 Property settlement agreements

**Insurance policies**

 Life insurance policies

 Disability insurance policies

 Long Term Care insurance

**Family Information**

 Account statements for children’s investments if applicable

 Care information for parents if applicable

**Prepare to discuss**

 Please come prepared to identify your short- and long-term financial goals.

Next meeting date: \_\_\_\_\_\_\_\_\_\_ Time: \_\_\_\_\_\_\_\_\_\_\_ Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_