Financial Planning Checklist

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.)
- ❑ **A list of your other assets**
  Homes, personal property, rental property, collectibles, etc.
- ❑ **A 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 & Policies

QUESTIONS I 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?**