

Documents Needed for Financial Planning

We believe that a Financial Plan integrates a financial mission, goals, and objectives into one cohesive plan which will allocate financial resources in a constant manner. We feel it is important to have a comprehensive understanding of a person's financial life, and your willingness to share the following information will assist us in beginning this process.

- Pay stubs showing current earnings
- Savings, checking, CD, money market, and investment account statements
- Most recent social security earnings and benefit statement
- Retirement account statements (IRA, 401(k)s, 403(b)s, SEP, pension plans, etc.)
- Deferred compensation, stock options
- Debt statements such as mortgage, credit cards, car loans, student loans, etc.
- Individual life and group life, disability, long-term care
- Homeowners and umbrella liability policies
- Current will, trust, and estate planning documents
- Education savings account information
- Personal assets: primary residence, real estate, automobiles, boats
- Tax returns for past two years (Business tax returns if applicable)
- Business interest/ownership
- Current Budget
- Retirement and financial planning goals