Financial Goals Checklist

CHECKLIST

During our appointment, we will be going over your Most Important Financial Goals. These goals will help provide a target for what you would like to accomplish and set expectations on your investments going forward.

I have included the information that we would like to have before our next appointment. This information will be the foundation that will help us better understand your current financial situation and where we need to provide the most support.

In order to protect your privacy, we ask that you do not email any of the following information. Please upload to the Vault in Client Access. You may also schedule a time that is convenient for you to drop off the information to our office.

- ❑ Full Statements for ALL Investment Accounts_________ IRA, ROTH, Individual, Joint, Trust, Education, etc.
- ❑ 401(k) Information___________________________________ Statement Showing Balance, Contributions and Employer Match
- ❑ 401(k) Summary Plan Description
- ❑ 401(k) - ALL Investment Options
- ❑ Pension Information _________________________________ Estimate of Benefit at Desired Retirement Age
- ❑ Stock Certificates, Savings Bonds ____________________ Include Any Other Financial Information Held at Home
- ❑ Insurance Policy Statements__________________________ Life, Disability, Long-term Care, etc.
- ❑ Business Real Estate Information_____________________ Rental Property Income Information
- ❑ Social Security Benefit Statement ____________________ Visit www.ssa.gov for Your Most Up to Date Benefit Estimate
- ❑ Checking/Savings Account information
- ❑ Current Budget
- ❑ Trust and Power of Attorney Documents
- ❑ Most Recent Tax Return

If you have any questions, please don't hesitate to reach out to our team. Thank you for your time and for allowing us the continued opportunity to earn your trust and confidence.

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