



FINANCIAL PLANNING MEETING

Checklist of Information to Bring

- Name, Social Security Number and birth dates of all family members and beneficiaries.
- Statements of all financial accounts
 - Checking Accounts
 - Savings and Credit Union Accounts
 - Investment Accounts
 - IRA Accounts
 - 401(k), SEP, SRA Accounts, etc.
 - 529 Accounts
 - Deferred Compensation Accounts
 - Annuities
 - Employee Stock Options
 - Any other investment statements
- Statements of debt accounts
 - Mortgages
 - Credit Cards
 - Automobile (owned, not leased)
 - Other Obligations
- Income Tax Return (Latest Filed)
- Insurance
 - Life Insurance Policies
 - Liability and Property Insurances (including Auto)
 - Disability Insurance (Know how much you buy and how much your employer buys for you, this is very important.)
- Information about your Will and any Trusts (Copies Requested)
- Information about your pension plan, if any
 - How much will it pay per month at what age?
 - Is there a spousal benefit, if so, what?
 - Is your pension cost of living adjusted (COLA)
 - Social Security Benefits Estimate from the SS Administration
 - <http://www.socialsecurity.gov/mystatement/>