



What to Bring to a Financial Planning Appointment

The following list provides a good example of useful items to bring to a financial planning appointment. However, don't make the mistake of stressing too much trying to find that missing tax return or pension benefits statement. It is not critical if you do not have everything on the list.

Budget Planning

- Most recent paycheck stubs
- A list of monthly expenditures (Bills such as rent/mortgage, utilities, food, etc...)
- Most recent credit card statements
- Any other bills
- Mortgage information (Approximate value of home, mortgage amounts, % rate...)

Tax Planning

- Tax returns for the last two years
- Most recent paycheck stubs (as above)

Risk Management

- Life insurance policies (Face amount, premiums, type of policy, ex: term, whole life.)
- Health/Dental coverage (Deductibles, premiums, type of plan, ex: HMO, PPO...)
- Auto/Homeowner's coverage (premium, amount of coverage)

Retirement/Investment Planning

- Most recent statement from company-sponsored retirement plans
- Most recent statements from IRAs or brokerage accounts
- Pension benefit information

Estate Planning

- Most recent Will, Trust, and ancillary documents (Powers of Attorney, Living Will)

If you have any questions about the list, don't hesitate to call me.