WEALTH
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PARTNERS

YOUR FINANCIAL PLAN CHECKLIST

Things to bring with you:

- ☐ Investment Accounts
  Current Statements showing value and positions (stocks, bonds, mutual funds, CD's, money markets, etc.)

- ☐ Bank Accounts
  Current Statements showing value and positions (CD's, money markets, etc.)

- ☐ List of Your Other Assets
  Homes, personal property, rental property, collectibles, etc.

- ☐ 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
  401k, IRAs, savings accounts, etc.

- ☐ All Sources of Income
  Salaries, pension plans, annuities, trust funds, rental income, etc.

Questions to be prepared for:

- When do you and your spouse want to retire?

- How much money will you need to live on at retirement?

- What are your goals?
  (Travel, new cars, boat, vacation home, etc.)

- Do you anticipate any inheritances?

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