YOUR FINANCIAL PLAN CHECKLIST

Things to bring with you:

- **Investment and Retirement 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.)
- **Liabilities**
  Current Statements for any debts: mortgages, loans, etc.
- **List of Your Other Assets**
  Homes, personal property, rental property, collectibles, etc.
- **Estate Planning Documents**
  Trust, Wills, Power of Attorneys.
- **Life Insurance and Long-Term Care Information**
  Statements showing type of policy, value and terms.
- **Social Security Information**
  Statements you may have received with an estimate of earnings at retirement. You can view your statements at ssa.gov
- **Current Saving Contributions**
  Employer sponsored retirement plans including company matches, IRAs, savings accounts, etc.
- **All Sources of Income and Any Supporting Documents**
  Salaries (pay stubs), 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 in retirement?**
- **What are your goals?** Travel, new cars, vacation home, children's college, charities etc.
- **Do you anticipate any inheritance?**

www.wmpaz.com
1980 E River Rd, Suite 120, Tucson, AZ 85718