Axiom
FINANCIAL STRATEGIES GROUP

Items needed for Your Financial Plan

- ☐ Annual Income– all sources
  - Will any of this continue in retirement?
- ☐ Retirement age
- ☐ Annual Spending in today's dollars – derived from budget spreadsheet
- ☐ Social Security
  - Anticipated benefit at 62
  - Anticipated benefit at Full Retirement Age of ____
- ☐ Value of investment accounts (please include most recent statement)
- ☐ Checking/Savings/CD account balances
- ☐ Value of additional assets
  - Vehicle
  - Collectibles
  - Other please include rental properties, second homes, business ownership (including %s)
- ☐ Value of Home
- ☐ Mortgage Balance, Interest rate, monthly payment, and year taken out
- ☐ Other debt – balances and interest rates
  - Credit card
  - Auto
  - Home Equity
  - Other____________________
- ☐ Life Insurance* (Do you have Long Term Care Insurance?)
  - Type
  - Cash Value
  - Premium
  - Beneficiary
  - Death Benefit
- ☐ Goals/Other Expenses
  - Travel budget
  - New vehicles
  - Health Insurance
  - Other____________________

*If you have a will and/or trust documents, please include those for our review.