



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.