



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.