Financial Portfolio Review Documents

There are a number of documents you'll need to bring to our initial financial portfolio review. Be prepared to answer questions regarding your age, current income, hobbies, goals, philosophy on money, group affiliations, etc.

Current Financial Situation

- ☐ Checking/savings accounts statements (most recent three months)
- ☐ Credit card statements (most recent three months)
- ☐ Pay stubs (most recent)
- ☐ Personal loans statements (most recent)
  - Mortgage
  - Student loans
  - Auto loans
  - Other loans

Protection Planning

- ☐ Insurance policy information
  - Life
  - Disability
  - Long-term care
  - Homeowners
  - Auto
  - Umbrella
  - Other

Wealth Accumulation/Retirement Planning

- ☐ All investment accounts statements (most recent)
  - IRA
  - Non-qualified brokerage
  - Annuities
  - 401(k)/workplace retirement accounts
  - Other
- ☐ Workplace benefits
  - Benefits handbook (if available)
  - Total economic package summary statement (if available)

Tax Planning

- ☐ tax return (most recent two years)

Estate Planning

- ☐ Copy of current will/trust/power of attorney

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