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.



Curren	t 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
Protect	tion 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 Pla	nning
	tax return (most recent two years)
Estate Planning	
	Copy of current will/trust/power of attorney
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