



Materials to Share

Financial planning advice is most effective when we have a good understanding of your complete financial picture. **Thank you in advance for taking the time to gather some of this information so that we can focus on the fun stuff: developing a financial plan that addresses your goals and dreams.**

STATEMENTS

- Bank (Checking/Savings)
- Pay Stubs
- Investment Accounts
- Retirement Accounts
- College Savings Accounts
- Mortgage
- Social Security Benefits
- Annuities
- Credit Cards
- Vehicle Loans
- Business Loans
- Student/Education Loans
- Personal Loans
- Lines of Credit
- Other _____

INSURANCE POLICIES

- Home Insurance
- Life Insurance
- Long-term Care
- Auto Insurance
- Rental Insurance
- Other _____

LEGAL DOCUMENTS

- Your Will
- Trust Documents
- Partnership Documents
- Other _____

CONTACT INFORMATION

- Your spouse or partner, if any, with whom you will be making financial decisions
- Accountant
- Attorney
- Trusted contact whom you authorize us to share account information with