YOUR FINANCIAL PLAN CHECKLIST

Things to bring with you:

- **Investment Accounts:** Current statements showing value and position (stocks, bonds, mutual funds, CDs, money markets, etc.)
- **Bank Accounts:** Current statements showing value and positions (CDs, money markets, etc)
- **List of Your Other Assets:** Homes, personal property, rental property, collectible, etc.
- **List of Your Liabilities:** Debts, mortgages, loans, etc.
- **Social Security Information:** Statements you may have received with an estimate of earnings at retirement.
- **Current Contributions:** 401-k, IRAs, savings accounts, etc.
- **All Sources of Income:** Salaries, pension plans, annuities, trust funds, rental **income, etc.**

Questions to be prepared for:

- When do you and your spouse want to retire?
- How much money will you need to live on at retirement?
- What are your goals? (Travel, new cars, boat, vacation home, etc.)
- Do you anticipate any inheritances?