1ST First Point
Wealth Management

With you at every Point...

FINANCIAL PLANNING CHECKLIST

- ☐ Income tax returns
- ☐ Social security statements
- ☐ Pay stubs – salary information
- ☐ All investment account statements (brokerage, 529 plans)
- ☐ All retirement account statements (DB, 401(k), 403(b), Roth, IRA)
- ☐ All bank account statements
- ☐ All life insurance statements
- ☐ All annuity statements
- ☐ All insurance policy statements (disability, LTC, etc.)
- ☐ Living expenses current
- ☐ Assumed retirement age
- ☐ Assumed life expectancy
- ☐ Income desired in retirement
- ☐ List of all assets (residence, real estate, vehicles, jewelry, collectables, etc.)
- ☐ List of all liabilities (mortgages, loans, credit card, etc.)
- ☐ Group benefit plans