

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

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