



FINANCIAL PLANNING CHECKLIST

- ✓ Last year's Income Tax Return _____
 - ✓ Investment, IRA, Retirement Account Statements _____
 - ✓ Social Security Statements *(if not currently receiving Social Security)* _____
 - ✓ Outstanding Loan Statements *(Auto, Credit Card, Home, etc.)* _____
 - 1. *Balance*
 - 2. *Rate*
 - 3. *Term*
 - 4. *Maturity Date*
 - ✓ Bank Account Information *(checking, savings, CD's money market)* _____
 - ✓ Life Insurance and Long-Term Care Insurance Policies or Statements _____
 - ✓ Wills and/or Trust Documents _____
 - ✓ Budget *(What are your monthly expenses?)* _____
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