



CHECKLIST FOR OUR MEETING

CASH, SAVINGS & INVESTMENTS

- Checking & savings account balances
- Inherited or trust account statements
- Mutual Fund, CD, bond and stock account statements
- Real estate holdings (house, rental property, vacation home) College account statements for children/ grandchildren

RETIREMENT PLANS

- Recent statement for 401K/profit-sharing plan
- Recent projection of your pension plan, State Retirement plan, etc. Recent IRA statements (Roth and/or Traditional)
- Other retirement plan statements (former employer plans, etc.)

OTHER ITEMS

- Current Social Security Projection (visit www.SSA.gov)
- Most recent pay stub, last year's W-2, and tax return (if available) Group life insurance and disability insurance coverage at work Supplemental life and disability insurance coverage at work
- Personally owned life and disability insurance policies Long Term Care insurance policies

QUESTIONS TO CONSIDER

- What goals are most important to you in the next 1-3 yrs? 4-10 yrs? 10-15 yrs?
- How do you feel about the progress you've made thus far towards your goals?
- When would you like to be financially independent?
- What does "retirement" mean to you?
- What do you imagine your monthly retirement income needs will be in?
- How much income do you need today (after tax) to maintain your monthly lifestyle?
- What people or organizations do you really care about?
- What kind of legacy do you imagine leaving behind when you're no longer here?

