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During our upcoming visit, we will gain a better understanding of your goals and what is important to you, as well as allowing you the opportunity to learn more about us and our team. Copies of the documents below are necessary for us to provide you with an accurate analysis of your financial picture and identify possible solutions that are in line with your goals. Please understand that all conversations and documents provided are kept completely confidential.

DOCUMENT CHECKLIST

- ☐ Most recent tax return
- ☐ Most recent Social Security Statements (available www.ssa.gov/myaccount)
- ☐ Potential pension statements
- ☐ Debt Information (including credit card and mortgage)
- ☐ Current bank statements
- ☐ Current investment statements
- ☐ Insurance Statements (including life, long term care, disability, and employer benefits)
- ☐ Will, Trust Documents, and Power-of-Attorney
- ☐ Statements regarding real estate and business holdings

Life Changes

- ☐ Marriage/Divorce
- ☐ Job/Career Change
- ☐ New family members
- ☐ Other _____

College Plan:

Ages of Children now _____
Yearly Expense _____
% Covered _____

Retirement Goals

Full Retirement Age _____
Semi-Retirement Age _____

RETIREMENT INCOME AND EXPENSE

BASIC LIVING EXPENSES

When it comes to expenses, prioritization is step one to creating a financial plan that accurately helps meet your needs. Completing the expense list below will give you a good idea of your current prioritization of expenses and how they will affect your plan. **Please complete tiers 1-4 to the best of your knowledge to receive the most accurate recommendations.**

TOTAL LIVING EXPENSES \$

TIER 1	TIER 2	TIER 3	TIER 4
Basic Needs (groceries, utilities, etc.)	Risk Insurance (life, disability, LTC)	Lifestyle (vacations, wants, etc.)	Charitable gifts
Target Annual Amount	Target Annual Amount	Target Annual Amount	Target Annual Amount

ADJUSTMENT TO LIVING EXPENSES

Some of your expenses listed above will end during retirement. Expenses that end will free up funds and reduce the amount needed in retirement. Please list these amounts below.

Description	Annual Amount (current dollars)	Year expense will end	Check if amount inflates

