Document Checklist

INCOMECONDUCTOR

Please bring as many of the documents below to our next meeting, as well as any other documents you think would be helpful. This information will allow us to create a customized retirement income plan that best suits your needs.

Name ____________________
Address ____________________
Phone ____________________

1 **Legal**

____ Copy of Will/Trust

2 **Assets**

Savings

____ Copies of Bank/CU Statements (CDs Money Mkt, etc.)

Investments

____ Copies of Most Recent Statements from:
- 401(k)s
- IRAs
- 403(b)s
- Other Company Plans
- Other Invesments Accounts (i.e. Taxable)

Sources of Retirement Income

____ Pension Estimates
____ Social Security Estimates

3 **Insurance**

____ Life Insurance Policies
____ Auto/Homeowners Policies
____ Long Term Care Policies
____ Group Benefits (Information regarding life, health, disability)

4 **Taxes**

____ Copy of Most Recent Tax Return

5 **Debt**

____ Mortgage, Auto, Revolving, HELOC, etc.
- Current Balance
- Monthyl Payment
- Interest Rate
- Yrs. Remaining

6 **Current Income**

____ Most Recent Paycheck Stub (if still working)