Documents and Information Needed

For our upcoming meeting, please have your logins for the following items (you can also bring in or email statements to us in advance):

- ❑ Recent 401(k) statements
- ❑ Recent statements for any other investment accounts
- ❑ Bank account balances (no statements needed)
- ❑ Debt balances or statements
- ❑ Loan balances, payment amounts, term length and interest rate
- ❑ Household budget, if using one
- ❑ Life insurance if changed from prior year, including amount and termination date

If a Risk Review is requested, we will also need the following:

- ❑ Life insurance policy
- ❑ Long-term care policy
- ❑ Property/casualty policy (home, auto, boat/plane, etc.)
- ❑ Umbrella policy

If an Estate Plan review is requested, the following would be helpful if you have it readily available:

- ❑ Wills
- ❑ Powers of attorney
- ❑ Medical directives
- ❑ Living will
- ❑ Trust