What to Bring to a Financial Planning Appointment

The following list provides a good example of useful items to bring to a financial planning appointment. It is not critical if you do not have everything on the list.

Budget Planning

Most recent paycheck stubs
A list of monthly expenditures (Bills such as rent/mortgage, utilities, food, etc…)
Most recent credit card statements
Any other bills
Mortgage information (Approximate value of home, mortgage amounts, % rate…)

Tax Planning

Tax returns for the last two years
Most recent paycheck stubs (as above)

Risk Management

Life insurance policies (Face amount, premiums, type of policy, ex: term, whole life.)
Health/Dental coverage (Deductibles, premiums, type of plan, ex: HMO, PPO…)
Auto/Homeowner's coverage (premium, amount of coverage)

Retirement/Investment Planning

Most recent statement from company-sponsored retirement plans
Most recent statements from all IRAs and brokerage accounts
Pension benefit information
Any other investment accounts
Banks accounts

Estate Planning

Most recent Will, Trust, and ancillary documents (Powers of Attorney, Living Will)

Any other documents that is maybe helpful to your financial, retirement, estate, risk or tax planning.