 Financial Planning Checklist

Date:

* Income tax returns
* Social security statements
* Pay stubs – salary information
* All investment account statements (brokerage, 529 plans)
* All retirement account statements (DB, 401(k), 403(b), Roth, IRA)
* All bank account statements
* All life insurance statements
* All annuity statements
* All insurance policy statements (disability, LTC, etc.)
* Living expenses current
* Assumed retirement age
* Assumed life expectancy
* Income desired in retirement
* List of all assets (residence, real estate, vehicles, jewelry, collectables, etc.)
* List of all liabilities (mortgages, loans, credit card, etc.)
* Group benefit plans

Securities offered through LPL Financial, member FINRA/SIPC

Insurance products offered through LPL Financial or its licensed affiliates

|  |  |  |  |
| --- | --- | --- | --- |
| **Not Insured by any Government Agency** | | **Not a Bank Deposit** | |
| **Not FDIC Insured** | **May Lose Value** | | **No Bank Guarantee** |