



## **Information Needed for Comprehensive Financial Plan**

- Medical/Long Term Care Policy
- Life Insurance Policies (In-force Illustrations if Applicable)
- Disability Insurance Policy or Information on Group Plan at work
- Liability limits on Auto/Homeowner's Policies
- Current Statements: (Roth IRAs, IRAs, 401K, Investments, Savings, Money Market, Profit Sharing, Stock Options, Stock Purchase Plan, etc.)
- Social Security statements (sent annually by Social Security Administration)
- Current Pay Stubs
- 401K/Employee sponsored plan information and investment choices
- Pension Benefit information booklet/Estimated benefit at retirement
- Spending Plan Expenses
- List of debts with balance, interest rates, and monthly payment
- Most recent federal and state tax returns
- Copy of Will or Trust