

WHAT TO BRING TO YOUR APPOINTMENT

- ☐ What is your current annual income/salary? (per person)
- ☐ What is your net take home pay per month? (combined)
- ☐ What is your principal & interest payment for your mortgage? When do you anticipate that being paid off?
- ☐ Recent statements or updated balances for any financial accounts you have **OUTSIDE** of your accounts here such as: IRA, 401(k), 403(b), SIMPLE IRA's, etc.
- ☐ Pension Statements, including estimate of benefit amount
- ☐ HSA account balance & annual contribution amount
- ☐ Current contribution rate to Employer Retirement Plan & Company Match Percentage, please specify if your contribution is Roth or Pre-tax
- ☐ Savings Amount (Monthly/Annual) for any outside accounts
- ☐ Current balances for Checking Accounts & Savings Accounts
- ☐ Monthly Budget, if you currently have one, if not skip this & Seth will cover it
- ☐ Rental or business income
- ☐ Tax returns for the past year
- ☐ Any insurance policies you would like to review
- ☐ Social Security estimate statements, to obtain these go to the Social Security website at: www.ssa.gov
 - click on "Sign In" in the top right corner
 - If you have previously set up an account on the Social Security site use that information to log in. If this is your first visit to the site click on "Create an account" and follow the prompts to get an account established and log in.
 - Agree to the terms of service
 - Click on "Your Social Security Statement"
 - Download and save, print or email the statement.
 - To exit the site securely click on "Sign Out" at the top of the page

394 Wards Corner Rd #150, Loveland, OH 4510. (513) 248-1900

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