

## Financial Planning Checklist

The following checklist details the information required to produce a comprehensive Financial Plan. Some items may not be applicable or readily available, however the more information you provide, the more realistic the plan will be.

- The first two pages of your most current Federal Income Tax Return
- Statements for all your Investment and Retirement Accounts including:
  - IRA's
  - 401(k)s, 403(b)s, etc.
  - Brokerage Accounts
  - CDs, Savings Bonds
  - Money Market, Savings Accounts
  - Other Investments
- Estimated annual contributions to your Retirement Accounts
- Estimated savings to your other Investment Accounts
- Pension Benefit Statements
- Other Company Employee Benefits Statements including:
  - Stock Options
  - Deferred Compensation
  - Any other employee benefits
- Social Security Benefit Statements
- Other income you expect to receive during retirement such as:
  - Wages
  - Rental Income
  - Property Sales
  - Inheritances
  - Gifts
  - Other
- Personal Life, Disability and Long-Term Care Insurance Policies (if applicable)
- Mortgage Balance(s) (approximate), monthly payment amount, interest rate, property taxes, annual home owner's insurance
- Income/Investment Properties (including Mortgage Balances, payments, etc.)
- Estimated Cost of Medical Insurance during Retirement

Lynn K. Opp, CFP®  
Vice President, Investments  
Lynn.Opp@RaymondJames.com