Financial Planning Checklist

Liquid/Investment Assets	Value	Loan Against?	
Home			
Other Real Estate			
Cash (savings, checking, money-market)			
CDs			
Stocks			
Bonds			
Mutual funds			
Annuities			
IRAs (Roth or Traditional?)			
Retirement Plans (401k, profit-sharing)			
Total	'	<u>'</u>	
Other Loans/Credit Card Balances	Amount		
Total			
	_		
lotal Assets	Total Loans		
Total Assets	Total Loans		
Iotal Assets		Snouse	
	Total Loans You	Spouse	
Annual Income		Spouse	
Annual Income Life Insurance (face value)		Spouse	
Annual Income Life Insurance (face value) Disability Insurance (monthly benefit)		Spouse	
Annual Income Life Insurance (face value) Disability Insurance (monthly benefit) Health Insurance (provider)		Spouse	
Annual Income Life Insurance (face value) Disability Insurance (monthly benefit) Health Insurance (provider) Long-Term Care/Nursing Home Insurance		Spouse	
Annual Income Life Insurance (face value) Disability Insurance (monthly benefit) Health Insurance (provider) Long-Term Care/Nursing Home Insurance Do you have a will?		Spouse	
Annual Income Life Insurance (face value) Disability Insurance (monthly benefit) Health Insurance (provider) Long-Term Care/Nursing Home Insurance Do you have a will? Are there Trusts established?	You		
Annual Income Life Insurance (face value) Disability Insurance (monthly benefit) Health Insurance (provider) Long-Term Care/Nursing Home Insurance Do you have a will?	You o Revocable	o Revocable	
Annual Income Life Insurance (face value) Disability Insurance (monthly benefit) Health Insurance (provider) Long-Term Care/Nursing Home Insurance Do you have a will? Are there Trusts established?	You		
Annual Income Life Insurance (face value) Disability Insurance (monthly benefit) Health Insurance (provider) Long-Term Care/Nursing Home Insurance Do you have a will? Are there Trusts established?	You o Revocable o Irrevocable	o Revocable o Irrevocable	
Annual Income Life Insurance (face value) Disability Insurance (monthly benefit) Health Insurance (provider) Long-Term Care/Nursing Home Insurance Do you have a will? Are there Trusts established? If yes, what type?	You o Revocable o Irrevocable o Charitable	o Revocable o Irrevocable o Charitable	
Annual Income Life Insurance (face value) Disability Insurance (monthly benefit) Health Insurance (provider) Long-Term Care/Nursing Home Insurance Do you have a will? Are there Trusts established?	You o Revocable o Irrevocable o Charitable	o Revocable o Irrevocable o Charitable	
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Annual Income Life Insurance (face value) Disability Insurance (monthly benefit) Health Insurance (provider) Long-Term Care/Nursing Home Insurance Do you have a will? Are there Trusts established? If yes, what type? Details of trusts:	vou o Revocable o Irrevocable o Charitable o Living	o Revocable o Irrevocable o Charitable	
Annual Income Life Insurance (face value) Disability Insurance (monthly benefit) Health Insurance (provider) Long-Term Care/Nursing Home Insurance Do you have a will? Are there Trusts established? If yes, what type?	vou o Revocable o Irrevocable o Charitable o Living	o Revocable o Irrevocable o Charitable	

What are your Financial Goals?

Short-Term:		
Long-Term:		