MILNE FINANCIAL PLANNING, INC.

A *Fee-Only* Advisor

FINANCIAL ADVICE WITH A DIFFERENCE!

The following, though not necessary a complete list, will enable us to quickly see your overall financial picture. If you can't find or don't have some of these items, don't worry, we can track them down later.

Account Statements:
- ☐ Retirement, 401k, 403b, IRA etc.
- ☐ Investment options for your 401k, 403b
- ☐ Investment / Brokerage
- ☐ Mutual funds
- ☐ Bank, Checking, Savings, CDs.

Insurance:
- ☐ Life (Original policy)
- ☐ Health
- ☐ Disability
- ☐ Long-term Care
- ☐ Homeowners/Auto
- ☐ **Work Benefits**
- ☐ **Pension Estimates or Payments**

Estate Documents:
- ☐ Wills
- ☐ Durable Power for Health Care
- ☐ Living Will
- ☐ Trusts
- ☐ **Tax Returns, 2 years**
- ☐ **Property Tax Bill**
- ☐ **Mortgage Statement**
- ☐ **Home Equity Balance**
- ☐ **Auto Loan Statement**
- ☐ **Credit Card Statement**
- ☐ **Social Security Estimates or Payments**
- ☐ **Divorce Decree/QDRO Documents**
- ☐ **Other helpful information & documents**

DREAMS and GOALS: Take a couple of minutes to answer the following questions

1. Why are you are seeking the guidance of a professional financial planner?

- ➢ ____
- ➢ ____
- ➢ ____

2. What are your top goals you would like to accomplish in life? (doesn't have to be financial related)

- ➢ ____
- ➢ ____
- ➢ ____

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