



Roadmap Information Request

WHERE DO YOU WANT TO GO NEXT?

- ☐ What do you want your wealth to do for you and your family?
- ☐ Is there anything keeping you from getting where you want to go?
- ☐ Do you have any passions – family, philanthropy, business, travel, art, cars, boats, wine, watches, etc.?
- ☐ When you think beyond what's next, do any legacy goals come to mind?

BACKGROUND INFORMATION

- ☐ Your primary address
- ☐ Your birthdate, name of spouse and his/her birthdate
- ☐ Name, birthdate and address of each child
- ☐ Name and address of your business – what is your role and how long do you expect to continue working?

BALANCE SHEET

Assets

- ☐ Bank, investment, retirement accounts
- ☐ Real estate holdings
- ☐ Business interests and private investments
- ☐ Insurance policies
- ☐ Other Assets

Liabilities

- ☐ Mortgages – balance, term, rate
- ☐ Home equity lines of credit – balance, term, rate
- ☐ Commercial debt or lines of credit – balance, term, rate
- ☐ Contracted payments such as insurance premiums
- ☐ Other Liabilities

CASH FLOW

Inflows

- ☐ Salary and bonus
- ☐ Income and distributions from business
- ☐ Sale of business – estimated net proceeds?
- ☐ Income from investment real estate
- ☐ Income from investment portfolio
- ☐ Other Inflows

Outflows

- ☐ Monthly expenses, lifestyle, travel, etc.
- ☐ Annual real estate taxes
- ☐ Auto expense
- ☐ Annual charitable contributions
- ☐ Contemplated large purchase, investment, or gift
- ☐ Other Outflows

FINANCIAL PAPERWORK

- ☐ Recent bank, brokerage and retirement statements
- ☐ Tax returns for the last three years
- ☐ Estate planning documents
- ☐ Documents for any trust of which you, or your spouse, are a beneficiary
- ☐ Business operating and/or partnership agreements
- ☐ Documents pertaining to any private investments
- ☐ Documents pertaining to any charitable vehicles
- ☐ In-force policy illustration for any life insurance

Please send information to:

Baird
ATTN: Baird Generational Wealth Group
777 E. Wisconsin Avenue, 20th Floor
Milwaukee, WI 53202

Or email to: bairdgenwealthgroup.com

Call us with questions: 414-298-7092.