

# Milne Financial Planning, Inc.

A *Fee-Only* Advisor

Jamie Milne, CFP, CDP



Financial Advice with a Difference!

## Documents to bring:

- Tax Returns, 2 years
- Pay Stubs
- Statements
  - Retirement, 401k, 403b, IRA etc.
  - Investment
  - Brokerage
  - Mutual funds
  - Bank, Checking, Savings, CDs.
- Insurance
  - Life
  - Health
  - Disability
  - Long-term Care
  - Homeowners/Auto
- Mortgage Balance and Terms
- Credit Card Balances
- Wills
- Durable Power for Health Care
- Living Will
- Trusts
- Work Benefits
- Social Security Estimates or Payments
- Pension Estimates or Payments
- Divorce Decree/QDRO Documents
- Home Equity Balance
- Other Information You Want to Bring

The above, though not 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.

## DREAMS and GOALS:

Take a couple of minutes and think about what you want to accomplish in life (your goals) and why you are seeking the guidance of a professional planner.

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2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

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