Heritage
WEALTH STRATEGIES

PRELIMINARY INFORMATION CHECKLIST

We look forward to meeting with you!

To make the most of our meeting, please gather the information below prior to your appointment.

- What would you like to discuss with us?
- What do you want your money to do for you and your family?
- What would you like us to know about you and your family?
- What are your primary financial concerns?

IMPORTANT NUMBERS AND STATEMENTS

- Cash Flow: income, expenses and contributions to savings, retirement, investment accounts
- Assets: cash deposits, real estate holdings, business ownership
- Labilities: personal debs, mortgage, business loans
- Retirement Statements: IRA, 401(k), 403(b), SEP, Deferred Compensation, Pension
- Investment Statements: Brokerage, Mutual Fund, 529, Trust

HELPFUL INFORMATION

- Employer-Sponsored Benefits: healthcare, insurance, retirement, health savings
- Protection: disability, life and long-term care insurance (statements or policies)
- Estate Planning: will, power of attorney, healthcare directive, trust documents
- Social Security benefits estimate: www.ssa.gov/benefits/retirement/estimator.html
- Taxes: prior year tax bracket or return, current year changes

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