

Current mailing address

Names and birthdays for all family members

If you are married, for how long

Any health issues you may have now or have had in the past

Outside of your nuclear family, do any family members require your financial assistance or are you dependent on them for financial assistance

List occupation and gross annual income

List average monthly net (after tax) salaries—include copy of pay stub (self employed may choose to send a recent tax return)

List any other sources of income

Detailed list of monthly and annual expenses

Detailed list of assets' (market values): home(s), properties, retirement accounts, investment accounts, bank accounts, collectibles, commodities, college savings accounts, children's custodial accounts, savings bonds: please include copies of statements when applicable

Detailed list of any debts: mortgage, HELOC, car payment, student loans, credit cards: include copies of statements if applicable

List current contributions to retirement accounts including employer contributions (on an annual basis if possible)

List any other contributions to savings/investments on a monthly or annual basis

List any future pension benefits with details including age when you are eligible to collect and what the projected payment would be

If you have children/grandchildren, will they go to college? If so do you plan on paying, will they pay or some combination of both?

Any other goals you may have: for example, a new car, annual vacations, weddings, early retirement, retirement in another location etc

List any life insurance you have either through your employer or privately owned: include copies of declaration page of life, homeowner's, auto, disability and LTC policies

Do you have a will and a named guardian for children?

List any other issues, questions, concerns about anything financial (or not) that I should know about.