

BRIODY MAHER

WEALTH MANAGEMENT GROUP

Investment Planning Checklist

Please use this checklist as a guide to collect and organize your financial information prior to our meeting

Personal

- Estimate of annual household expenses
- Most recent federal and state income taxes
- Personal property appraisals, if relevant
- Business valuation appraisals, if relevant

Employer Information

- Current paycheck stub
- Summary of company benefit plans and annual benefits summary-if available
- Deferred Compensation and/or bonus deferral plans
- Stock options and/or restricted share statements
- Other company benefit plans
- Group life and disability summary

Savings and Investment

- Bank statements: checking, savings, CDs
- Investment statements: stocks, brokerage, mutual funds
- Annuity statements
- Summary of real estate investments
- Education savings accounts: 529s, UGMA/UTMA, Coverdell savings, Trusts

Retirement Funding

- Retirement savings accounts: traditional IRA, ROTH IRA
- Retirement plan statements: 401(k), 403(b), TSA, Keogh
- Employer-sponsored pension plan summary, if applicable
- Social Security benefits statement, if available

Loans and Liabilities

- Mortgage, home equity loans, student loans, any other loan statements

Insurance Information

- Life insurance statements
- Disability Insurance statements
- Long term care insurance statements

Estate Planning Documents

- Wills, power of attorney documents, advanced health care directives
- Revocable and irrevocable trust documents
- Gift tax returns, if applicable

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