



FINANCIAL PLAN CHECKLIST

Basic documents:

- Recent statements for all retirement accounts not at our firm
- Recent statements for investment accounts not at our firm
- Social Security statements (create an account at SSA.gov)
- Statement for stock options and other deferred compensation
- Pension statements
- Most recent tax return

Basic information

- Total annual household income from employment or business: _____
- List all consumer debt & terms (credit cards, vehicle loans): *example: 3 yrs left on car payment @\$450/month*

- Mortgage debt + years remaining: _____
- Total education debt in your name: _____
- Monthly spending (average last 3 bank statements): _____
- Royalty income: _____
- Net rental income: _____
- Business valuation: _____
- Business debt: _____

- Do you have a buy-sell agreement?
Y / N
- Briefly describe and value any real estate or significant property other than your primary residence:

Questions

- Do you have health insurance for all dependents in the family? Y / N
- If working, do you have disability insurance? Y / N
- How much are you saving each month for retirement? _____
- Do you have an emergency fund of at least 3 months of cash? Y / N
- What age(s) would you like to retire?

- Do you have loved ones who will rely on you for care? Y / N / M
- Do you have life insurance? Y / N
- Do you have long term care insurance? Y / N
- Do you and your spouse have wills? Y / N
- Do you have a trust? Y / N

List your top 3 priorities or concerns:

- 1) _____
- 2) _____
- 3) _____

115 North Oak Avenue | Mineral Wells, Texas 76067 | 940.325.9800 | fax 940.325.9811
www.cornerpostfinancial.com