DASHBOARD WEALTH ADVISORS

HOMEWORK LIST

We are looking forward to getting a chance to learn more about you and your family. In order to make the most of our initial conversation, we've put a list of things together that will be useful to have during our **DASHBOARD PLANNING MEETING**:

PLEASE NOTE: *Don't view this as a checklist, but more of a guide to best utilize our time during our data gathering conversation.*

- Retirement/life goals and dreams (This is incredibly important so spend some time thinking about this)
- Investment account balances including: IRA's, Roth IRA's, Joint, Individual and Trust accounts, College Accounts and 401k balances
- Checking/Savings account balances
- Home Value and mortgage amounts (both loan amount and interest rate)
- Listing of all other debts including home equity loans, 401k loans, car loans, credit card debt, college debt, etc.
- Listing of any direct ownership in other real estate, business interests or partnerships
- Details of any annuities owned
- Whole Life, Variable Life and Term Insurance owned including death benefit, cash value and annual costs of each policy
- Details of any long-term disability and long-term care insurance policies
- Details of basic property and casualty coverage including Umbrella coverage amounts
- Details of most recent estimates of Social Security Income
- Details of any and all vested pension benefits
- Details of any deferred compensation plans, stock options, restricted stock or other benefits
- A good estimate of your current monthly or annual living costs (This is incredibly important. The better you understand your own spend rates, the better we can assess the amount of assets needed to provide your retirement income!!)
- Details of your overall estate plan including any trusts funded and in place
- Unique Family dynamics
- Charitable interests or planned giving initiatives

We look forward to our meeting. Please don't hesitate calling or emailing with any questions.

Dashboard
WEALTH ADVISORS

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