

# A First Step in Planning for Your Financial Future

## DATA GATHERING CHECKLIST

### PERSONAL INFORMATION

- Family Names, DOB, SSN
- Address
- Phone Numbers

### ACCOUNT STATEMENTS

- Bank Accounts
- Brokerage Accounts
- Retirement Accounts  
*401k, IRA, 403b, Pension*
- Annuities
- Education Savings Accounts  
*529, Coverdell*
- Health Savings Accounts (HSAs)

### LIABILITY STATEMENTS

- Mortgages  
*Balances, Terms, Original Amount, Interest Rate*
- Auto Loans
- Student Loans
- Credit Cards
- Private Loans

### INCOME & EXPENSES

- Pay Statements
- Social Security Statements  
*ssa.gov/myaccount*
- Annual Living Expenses

### INSURANCE STATEMENTS

- Life
- Disability
- Health
- Long-Term Care
- Homeowners/Auto/Umbrella

### EMPLOYMENT BENEFITS

- Benefits Handbooks
- Summary Plan Descriptions
- Profit Sharing, TSPs, ESOP/Stock Options

### INCOME TAX RETURNS

#### *Past 2 Years*

- Federal Returns
- State & Local Returns

### ESTATE DOCUMENTS

- Wills
- Powers of Attorney
- Advance Directives  
*Living Wills*
- Beneficiaries
- Trusts

Learn more about what we offer and our team at [CommunityAmerica.com/Financial-Planning](https://CommunityAmerica.com/Financial-Planning).



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May Lose  
Value

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