



Let's Get Organized!

Reaching your financial goals starts with organization. Organization creates *awareness*. And awareness allows you to leverage your strengths.

Here's a handy checklist on what to gather to get started.

Assets

- Bank account statement
- Savings account statement
- 401k / 403b statement (both current and from previous employers)
- IRA (Roth, Traditional, or Rollover) statements
- Investment account statement
- Annuity statement

Debt

- Mortgage statement
- Student Loan statement
- Credit Card statement
- Car Loan information

Income and Expenses

- Recent Pay Stub
- Estimated monthly expenses (be sure to include groceries, gas money, cell phone bill, car insurance, travel, gifts, home improvement, etc.).

Risk

- Life Insurance policy
- Disability Insurance policy
- Long Term Care Insurance policy

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