MEEKS
FINANCIAL GROUP
An Independent Firm

Important Documents for Financial Planning

- ☐ Statement of all retirement plans (401(k)s, profit sharing, pensions, etc.)
- ☐ Social Security Statement (or anticipation of income, website available)
- ☐ Summary of Bank Accounts (Average Balances)
- ☐ Statements of investments accounts showing holdings
- ☐ Insurance Statements (life, annuities, disability, long term care)
- ☐ Summary of Real Estate Holdings
- ☐ Debt information including mortgages, Home Equity Loans, and personal debt
- ☐ Last Year's Tax Return
- ☐ Income/Expense Summary
- ☐ Wills and Powers of Attorney (date and execution)
- ☐ Any trusts that have been established
- ☐ Contact information for your CPA and Estate Attorney

Discussion Topics

- Goals (retirement goals, legacy goals, providing for others, etc.)
- What would you like your financial legacy to be?
- What are your financial concerns?
- What challenges do you see in your future?