Pre-Appointment Checklist

INVESTMENTS

- Brokerage statements for individual, joint, trust, or estate accounts
- Traditional IRA and Roth IRA statements
- Employer retirement plans such as 401k, 403b, or 457
- Stock option information
- Pension plan estimates
- 529 college plans and custodial accounts

Note if you are making regular monthly contributions to any accounts

INSURANCE

- Life insurance policies, both group and individual
- Disability insurance, group and individual
- Long-term care insurance policies
- Home and auto insurance policies, including deductibles and coverage limits
- Umbrella liability coverage, if applicable

LEGAL, TAX, AND INCOME

- Wills, financial power of attorney, and healthcare directives
- Most recent tax return
- Recent paystub
- Social Security statement from ssa.gov
- Monthly budget
- Money owed to you, including personal loans or real estate interests

DEBTS

- Mortgage details, including balance, rate, and estimated home value
- Auto loans with balances and interest rates
- Business loans with balances, rates, and terms
- Credit card balances, rates, and monthly payments
- Personal or other loans

If you do not have everything, that is okay. Please send what you can as early as possible, and at least three days before your meeting.

For more information, visit www.tuttlewealth.com or call: 800-871-1219, Mail: info@tuttlewealth.com

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