



MONEYEDGE® Checklist

To work effectively with you and your family we need to understand not only *where you want to go...* but also *where you are right now!*

So gather what you can, using this checklist as a guide. However, if you can't locate something, we can estimate for now. Remember, it is far better to get started rather than waiting; we can easily update your MoneyEdge as more information is available.

Income & Tax Information:

Pay stubs for a recent, typical month, details on any part time incomes, your most recent property tax statement. Last year's tax return would also be helpful, especially if self employed.

Individual Retirement Account Statements:

Traditional IRAs, Roth IRAs, and other individual retirement account statements.

Company Retirement Account Statements:

401(k)s, 403(b)s, 457s, SEP-IRAs, SIMPLE-IRAs, Pensions, any other funds earmarked for retirement

Pension and Social Security Statements:

Most recent social security statements if available and any current or future pensions you are eligible for.

Non-Retirement Savings or Investment Account Statements:

Savings and checking statements, CDs, mutual funds, or any other funds *not* earmarked for retirement

Insurance Policies, Illustrations, Premium Statements, Declaration pages:

Auto, Home, Health, Life, Disability, Group Plans, Long Term Care, any others

Loan Statements:

Home mortgage, installment loans, most recent credit cards statements, any other outstanding loans

Company Benefits Statements:

Annual or quarterly benefit statements and/or booklets

Children's Accounts Statements:

Savings accounts, Savings bonds, Coverdell ESAs, UGMAs, UTMAs, 529 Savings Plans, 529 Pre-paid tuition plans, or anything earmarked for education

A MoneyEdge can be developed without all this information, but more accurate information will provide you with a more complete financial picture and possibly do a better job to...

Sharpen Your Finances with the MoneyEdge!

All your information will be treated with the utmost care and kept strictly confidential.