

# Client Meeting Worksheet

Start here to gather information needed to begin the financial life planning process.



## What To Bring

### ☐ INCOME INFORMATION

Most recent pay stubs or recent W-2 or 1099. This details your income and deductions or expenses.

### ☐ CURRENT BANK STATEMENTS

Checking, savings, and money market accounts.

### ☐ CURRENT INVESTMENT STATEMENTS

Brokerage accounts, mutual funds, stocks, retirement plans, etc. This information will allow us to analyze your investments and make certain that they match your goals and risk tolerance.

### ☐ RECENT TAX RETURNS

Tax return with all schedules and/or statements. Your income tax return helps us to determine your tax efficiency.

### ☐ LOAN INFORMATION

Mortgages, student loans, credit cards, etc. We need to know about any outstanding debt/loans so we can discuss payoff or payments.

### ☐ LIST OF ASSETS

Any other items of value which are not included on account statements.

☐ **SPENDING INFORMATION**

Quickbooks reports, Mint.com screen prints, American Express statements, back of the envelope numbers... however you chose to track your expenses. How you spend your money tells us what your really value.

☐ **ESTATE DOCUMENTS**

Wills, trusts, powers of attorney. Any estate documents that you have had drawn up.

☐ **LIFE INSURANCE & DISABILITY**

Policies or recent statements. We will review amounts and terms of policies.

☐ **PROPERTY & CASUALTY INSURANCE**

Declaration pages for your home, auto, boat, jewelry, umbrella, and any other policies on your things.



**LIFE PLANNING PARTNERS**  
FINANCIAL HEALTH FOR LIFE

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