

Integrity Wealth™

DOCUMENT and INFORMATION CHECKLIST

1. BANK STATEMENTS (ASSETS AND LIABILITIES)

- Value of savings and checking accounts
- IRAs/Brokerage accounts not with our practice
- Loan Information (cars, boat, education and/ or mortgage) such as balance, interest rate, and minimum payments required

2. OTHER ASSETS AND EMPLOYER INVESTMENT DOCUMENTS

- 401k statements
- Profit sharing statements
- Deferred compensation statements
- Stock options statements
- Life Insurance information and/or Long Term Care Insurance (LTC) - policy details such as death benefit, coverage amount, and your monthly or annual premium costs (if not already in our plan)

3. UPCOMING LIFE EVENTS TO CONSIDER

- | | |
|---|---|
| <input type="checkbox"/> Career Change | <input type="checkbox"/> Marriage / Divorce |
| <input type="checkbox"/> Debt Management | <input type="checkbox"/> Business Sale/Purchase |
| <input type="checkbox"/> Domestic Partner Planning | <input type="checkbox"/> Passing of a Loved One |
| <input type="checkbox"/> Education Funding | <input type="checkbox"/> Retirement Transition |
| <input type="checkbox"/> Serious Health/ Disability Issue | <input type="checkbox"/> Aging Parent |

4. MISCELLANEOUS

- Current wage/business income
- Significant other current incomes
- Current pension/Social Security incomes (if you are retired)
- Your most recent tax return
- Updated Social Security Information (can be found at ssa.gov/myaccount)

***Other items we may need to consider in the next twelve months such as a home purchase, car, vacation, etc.**

14850 Scenic Heights Road Suite 110 Eden Prairie, MN 55344 | Phone: 952-937-5003