

**Item’s needed for Multiyear tax & Retirement Planning**

* Latest Taxes
* 401k statements, contribution amounts, employer match
* 403b statements, contribution amounts, employer match
* Pension statements, Distribution schedule
* ROTH IRA statements, contribution amounts
* 529, UTMA, Coverdale education accounts, contribution amounts
* Traditional IRA statements
* Non-Qualified investments statements
* Savings account statements, rates of return
* Checking account statements, rates of return
* Business interest, value, loans
* Credit card debt, interest
* Value of properties, loans, payment, interest rate
* Personal, Student Loans amounts, terms, interest rates
* Value of personal items
* Value of vehicles, loans, interest rate, payments
* Monthly cost of living, see attached budget
* Life Insurance policies (Work and Personal) Premiums, death benefit, cash value
* Short term Disability, premiums, period covered
* Long Term Coverage, premiums, period covered
* Disability, premiums, period covered
* Long term care insurance, premium, Monthly benefit
* Inheritance if any, timeline
* Will, Trust, Marital Agreement
* Power of Attorney, Power of Health Care