

PLANNING ORGANIZER



GATHER "EVERYTHING WITH A NUMBER ON IT"

REAL ASSETS

- Addresses of Real Estate Owned

SAVINGS & INVESTMENTS

- Bank Accounts
- Taxable Brokerage Accounts
- Retirement Accounts
- Annuities
- Pensions
- Education Savings Accounts
- Health Savings Accounts

LIABILITIES

- Mortgages
- Auto Loans
- Student Loans
- Credit Cards
- Private Loans
- Divorce Obligations

INCOME & EXPENSES

- Pay Statements
- Social Security Statements (ssa.gov)
- Estimated Annual Living Expenses

INCOME TAX RETURNS

- Past 2 Years Federal Returns
- Past 2 Years State & Local Returns

ESTATE DOCUMENTS

- Wills
- Powers of Attorney
- Advance Directives (Living Wills)
- Beneficiary Designations
- Trusts

EMPLOYEE BENEFITS

- Benefits Handbook
- Summary Plan Descriptions (SPDs)

NOTES
