NCA
FINANCIAL PLANNERS
Relationships are built on TRUST

Please bring copies and/or be prepared to discuss the following items at your meeting:

Retirement

- ☐ At what age would you like to retire?
- ☐ How much would you like to spend on a monthly basis in retirement?
- ☐ Social Security statement
- ☐ Pension details

Liabilities/Expenses

- ☐ Mortgage information - balance, interest rate, loan term, fair market value of home
- ☐ Details regarding any debt - home equity line, credit card, student loans
- ☐ Budget or an estimate of current monthly living expenses
- ☐ Any anticipated future expense/purchases

Investments

- ☐ Your most recent statement for all investments, including work retirement plans
- ☐ A list of investment options for your work retirement plans

Taxes

- ☐ Copy of your most recent tax return
- ☐ Copy of your most recent pay stub

Insurance

- ☐ Declaration pages for home, auto and umbrella policies
- ☐ Life insurance details – both employer provided and independently purchased
- ☐ Disability insurance details – both employer provided and independently purchased
- ☐ Long-term care insurance details

Estate Planning

- ☐ Will
- ☐ Trust
- ☐ Durable power of attorney
- ☐ Healthcare power of attorney
- ☐ Living will

Other

- ☐ College savings/529 plan details
- ☐ Any other financial information relevant to your situation