



Your Document Checklist for Every Season

What to have ready before each of your Four Seasons of Financial Planning meetings

Before each meeting, pull together what you can for that season. Don't worry if you come empty-handed — many of these items we can simply talk through together, and having documents is a bonus, not a requirement. Some is always better than none.



WINTER

Retirement & Cash Flow

GATHER AHEAD OF YOUR MEETING

Current Income Sources

- No documents needed — we'll talk through where your income is currently coming from.

Monthly Average Spending Figures

- Ideally gathered from an expense organization tool like Monarch Money.

Mortgage Information

- Current balance, interest rate, loan term, and monthly principal & interest payment.

Other Loan Information

- Student loan statements, credit card statements, and any other outstanding balances.

Social Security Statements

- Available at ssa.gov — sign up for a free account if you don't have one yet.



SPRING

Tax Planning & Insurance Optimization

GATHER AHEAD OF YOUR MEETING

P&C Insurance Declaration Pages

- Home, auto, umbrella, and jewelry.

Life, Disability & Long-Term Care Insurance — Statements & In-Force Illustrations

Most Recent Tax Return — All Schedules & Statements



SUMMER

Estate Planning & Assistance to Loved Ones

GATHER AHEAD OF YOUR MEETING

Beneficiary Designations

- Retirement accounts, life insurance, and any TOD or POD accounts.

Estate Documents

- Wills, trusts, living wills, and power of attorney.

Family Financial Support

- Any regular financial assistance given to or received from family members.

Legal Agreements

- Divorce decrees, separation agreements, and prenuptial agreements.



FALL

Investment & Account Reviews

GATHER AHEAD OF YOUR MEETING

Brokerage & Taxable Account Statements

Pension & Annuity Statements

Retirement Account Statements

- IRA, Roth IRA, 401(k), 403(b), and similar accounts.

Have online account access? Even better. If you can log in to your accounts — brokerage, retirement plan, insurance, Social Security, or anything else — there's no need to gather statements in advance. We can pull everything up together during our meeting, download what we need, and make any updates on the spot. Just have your login credentials handy.

We meet four times a year — one focused meeting per season — so your plan always stays current.

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