WEALTH & INVESTMENT PLANNING

www.wilkewealth.com | 414-856-3060

Planning Documents Checklist

Upload documents or link accounts to the Secure Share Portal by visiting www.wilkewealth.com and clicking the Client Website link.

Individual & Household Statements

- ❑ Checking Account *
- ❑ Savings Account *
- ❑ Money Market Account *
- ❑ College Savings Account Statement *
- ❑ Brokerage Account Statement *
- ❑ Annuities Statement
- ❑ Social Security Income Projection
  - ❑ *Need Help?* Log on to ssa.gov
- ❑ Copy of last year's Tax Return
- ❑ Additional insurance policies
  - ❑ Disability
  - ❑ Whole Life
  - ❑ Term
  - ❑ Long-term Care
  - ❑ Burial or Funeral Policies
- ❑ Estate Planning Documents
  - ❑ Wills
  - ❑ Trusts
  - ❑ Power of Attorneys
  - ❑ Health Care Proxy

Private, Rental, & Commercial Real Estate

- ❑ Mortgage Statement
  - ❑ Interest Rate
  - ❑ Mortgage Term
- ❑ Estimated Value
- ❑ Property Taxes
- ❑ Property Income

Employer Benefit Statements

- ❑ Employer Benefits Booklet
  - ❑ Life Insurance
  - ❑ Disability Insurance
  - ❑ Supplemental Life
- ❑ Paystub
  - ❑ Current year-to-date
- ❑ Annual Bonus
  - ❑ Past two years
- ❑ Retirement Plans *
  - ❑ 401k or Roth 401k
  - ❑ 403b or Roth 403b
  - ❑ 457
  - ❑ Other
- ❑ Voluntary Selections
  - ❑ Anything additional you selected beyond employer offerings.

Need Help? Reach out to your company's Human Resources Department or employee benefits website.

*** Link the accounts** you use to get an accurate picture of your finances.

- Bank Accounts
- Credit Cards
- Brokerage
- Retirement
- Insurance