



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](http://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](http://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

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