



FINANCIAL TRAIL HEAD CHECKLIST

Having the right information gathered for your first meeting is helpful, but not required. Our team will follow-up with any missing components that we need to gain a clear understanding of where your path starts. We've put together a helpful checklist to get our conversation started on the right foot.

DOCUMENTS TO GATHER

- Checking & savings accounts statements
- Investment account statements
- Retirement account statements including 401(k) or 403(b) accounts
- Employer benefits overview, including pension estimates
- Social Security information
- Loan balances (student loan, mortgage, auto, credit card, etc.)
- Estate planning documents (will, power of attorney, trust, etc.)
- Insurance policies (home, auto, life, health, disability, long-term care)
- Federal and state tax return for latest filing

THINGS TO CONSIDER

How do you feel about your current financial position?
What does long-term financial peace mean to you?
What does retirement look like for you, and when?
What legacy do you hope to leave?
What are your short term goals (next 12 months)?
What are your mid-term goals (next 5 years)?
What made you reach out to Stewart Financial Group?

THINGS TO PRIORITIZE

Rank the following from 1 (not at all important) to 10 (very important) in order of importance to you personally, or as a couple.

- ___ Debt reduction
- ___ Provide financially for adult children
- ___ Long-term care costs
- ___ Care for aging parent(s)
- ___ Activities in retirement
- ___ Second/vacation home
- ___ Charitable giving
- ___ College expenses for child(ren)/grandchild(ren)
- ___ End of life planning
- ___ Other

