

The great thing about working with My Financial Coach is that the majority of financial institutions can be digitally linked with our software! This means that all of your transactions can be tracked in one place and will update in real time. However, a good financial plan goes beyond tracking everyday purchases. Our Subject Matter Experts can review insurance policies, investments, and annuities to ensure that they best serve your long-term financial needs and goals.

Below is a checklist of documents/information that your coach will need to gather from you before your second call. (not all will apply in your situation)

Job:

- Employer Benefits Descriptions
- Business Ownership/Entity Information
- Business Loan Information
- Business Succession Plans
- Buy-Sell Agreements

Retirement:

- 401(k)
- Traditional IRA
- SIMPLE IRA
- Roth IRA
- SEP IRA
- ESOP/ISOP
- Pension

Beneficiary:

- Annuity/Trust Payout information (as a beneficiary)
- Deferred Compensation Information

Assets:

- Primary/Secondary Home Information
- Investment Properties
- Value of Heirlooms/Collectibles
- Cash/Equivalent
- Concentrated Stock

Estate Planning:

- Will
- Trust Document
- Power of Attorney Information

Taxes:

- Tax Returns
- W-2/1099
- Charitable Giving Habits/Records
- Property Tax Information
- Interest Rates

Insurance:

- Life Insurance Policies
- Car Insurance Policies
- Long Term Care Insurance Policies
- Disability Insurance Policies
- Renters Insurance Policies
- Umbrella Insurance Policies

Loans:

- Student Loan Payment Information
- Car/Vehicle Loan Payment amounts
- Home Loans
- Personal Loans
- Medical Loans/Payments
- HELOCs

If you can't get your financial institution to link digitally, please gather the following information and provide it to your coach:

- Credit Card Statements
- Debit Card Statements
- Paystubs
- Interest Payments
- Dividend Payouts
- Trust Distribution Amounts
- Stock/Investment value information

Your coach will also consider any information regarding expected changes of lifestyle such as marital status, new large purchases, etc. Your coach will incorporate long-term goals into your plan too, so any plans to buy a retirement/vacation home, or pay for a wedding someday need consideration as well. **Before making any big changes in the future after your initial financial plan is delivered, ask your coach first to ensure continued stability of your financial situation!**