Financial Planning Pre-session Checklist

Below is a simple checklist to prepare for your financial planning appointment.

- [ ] Fill out the **“New Client Questionnaire”** under the forms section on www.**fernandezllc.com**

Income/Expenses

- [ ] Bring the last two years of tax returns to our meeting
- [ ] Bring recent account statements and list of investments
- [ ] Mortgage, auto leases or loans, credit cards or other debts. Bring details of amounts owed, interest rates, minimum and current payments and terms (e.g., 30-yr fixed, variable rate, etc).
- [ ] Please bring copies of your pay stubs to show deductions and taxes

Employer/Self-Employed Benefits

- [ ] Bring information about investment options and a recent account statement
- [ ] A recent Social Security Benefits Estimate Statement
- [ ] Bring information regarding coverage levels on medical benefits, flexible spending accounts/health savings accounts, and life, long-term disability and long-term care coverages
- [ ] Bring information regarding investment options. Include any employer match on 401k

Insurance

- [ ] Coverage details for auto and home, including umbrella policy.