

In preparation for meetings with your trusted advisors, can you prepare a list of these materials to share with them?

1. List all your financial accounts (checking accounts, investment accounts, IRAs, etc.) and their monetary value and projected annual income
2. List all real estate assets (houses, rental properties, commercial buildings, investment partnerships, etc. and their monetary value and projected annual income
3. List all other businesses or investment partnerships owned wholly or partially and their estimated monetary value and projected annual income
4. List all legal documents and entities in place governing the above assets plus your will, power of attorney and health care documents
5. List the persons in charge of your accounts, trusts, estate or businesses if you are incapacitated or deceased
6. List your charitable endeavors (donor advised funds, private foundations, bequests, etc) and their estimated value and annual contribution levels
7. List your beneficiaries including spouses, children, pets, and charities
8. List all your life insurance policies and those of your family members
9. List the assets of your family members which are relevant to your financial picture (including ex-spouses and step-children if there are financial obligations)
10. List your debts and liabilities including mortgages or debt not excluded from the financial values above
11. Discuss your personal income potential and goals for your future cashflow
12. List the most important matters, besides the above, to discuss with your personal advisors: special circumstances, values, goals, pursuits, past & future milestones