FINANCIAL ADVISORS · FREE TEMPLATE

Financial planning questionnaire

Everything a first financial plan is built from, gathered in one go: income, savings and investments, insurance and estate documents, and what the client wants the plan to do.

Income

☐ **Your two most recent pay stubs**

☐ **Your last two years of tax returns**
Every page, including the schedules.

Savings and investments

☐ **Retirement account statements**
401(k), 403(b), IRA or Roth IRA — the latest statement for each.

☐ **Brokerage account statements**

☐ **Bank and savings account statements**

☐ **Your Social Security statement**
You can download it from ssa.gov/myaccount.

Protection and estate

☐ **Life, disability and long-term care insurance policies**

☐ **Your will and any powers of attorney**

☐ **Any trust documents**

☐ **Your employer’s benefits summary**

Goals

When would you like to be able to retire?
An age is fine.

What would you most like this plan to help with?