

RETIREMENT 360 PLANNING CHECKLIST

ASSETS

- Estimated home value
- Other real estate ownership
- Estimates of personal property
- Estimate of business assets
- Education savings
- **Most recent statements**

DEBTS

- Amount owed and to whom
- Interest rate and terms of debt(s)
- Monthly payments on each

INCOME

- Estimated annual income
- Bonuses
- Other income sources

SAVINGS

- Taxable and education
- Retirement and company match

INSURANCE

Please provide the policies:

- Life and Disability
- Long-Term Care
- Liability/Umbrella

For each policy, please provide:

- Coverage amount
- Term and type
- Monthly premium payment
- Cash value
- Owner and beneficiary
- Umbrella policy and amount

ESTATE PLAN

- Wills and trusts
- Power of attorney
- Health care directives and guardians
- **Beneficiaries – Insurance policies**
- **Beneficiaries – Retirement accounts**

OTHER ITEMS

- Recent Social Security statements
- Other items of importance

