



LEON

FINANCIAL SERVICES

Documents to Gather FOR YOUR FINANCIAL PLAN

The more complete and accurate your information,
the more powerful your financial plan.



PLEASE GATHER THE DOCUMENTS YOU WOULD LIKE TO BE
REVIEWED AND INCLUDED IN YOUR FINANCIAL PLAN.

This list is to help you as a memory jogger.



FINANCIAL FOUNDATION

- 1 **Most Recent Federal Tax Return (1040)** Helps us understand your tax situation and identify opportunities.
- 2 **Social Security Statement** Provides an estimate of your future benefits.
- 3 **Pension Benefit Statements** Including information on any government, military, or employer pensions.
- 4 **Retirement Account Statements** IRA, Traditional/Roth IRA, SEP, SIMPLE.
- 5 **401(k), 403(b), TSP Statements** Including most recent quarterly statements.
- 6 **Brokerage / Investment Account Statements** Taxable investment accounts.
- 7 **Savings and Checking Account Statements** Including CD's and money markets.



INSURANCE & PROTECTION

- 8 **Life Insurance Policies** Include term, whole life, and universal life policies.
- 9 **Long-Term Care Insurance Policies**
- 10 **Disability Insurance Policies** Short-term and long-term.
- 11 **Medicare Supplement / Advantage Information**



ESTATE PLANNING

- 12 **Will** Most recent version.
- 13 **Trust Documents** Revocable and/or irrevocable trusts.
- 14 **Powers of Attorney** Financial.
- 15 **Healthcare Directives** Living will, healthcare proxy.



LIABILITIES

- 16 **Mortgage Statements** Including current balance and interest rate.
- 17 **Home Equity Loans / Lines of Credit**
- 18 **Credit Card Statements** All open accounts.
- 19 **Vehicle Loans / Leases** Current payoff information.



ADDITIONAL INFORMATION

- 20 **Recent Property Tax Statement** Primary residence and other properties.
- 21 **Business Ownership Documents** If you own a business.
- 22 **Rental Property Information** Including income and expenses.



OUR APPROACH

As a fiduciary, we are committed to acting in your best interest. Our goal is to help you build a clear, coordinated plan for your financial future.



CONFIDENTIAL

Your information is handled with the highest level of confidentiality and security.



LET'S PLAN YOUR FUTURE

Don't worry if you don't have everything available. We can begin with what you have and identify any additional information that may be helpful during our conversation.



ORGANIZED TODAY. CONFIDENT TOMORROW.
Let's build your legacy together.

573-381-3134
leo@leonfinancialservices.com
www.leonfinancialservices.com