

Financial Wealth Building Check-Up

In order to assist with your financial life planning process, please gather the following documents and information and have them available at the time of our initial appointment. This will allow **James Brown Financial Services, Inc.** to do a good financial wealth building check-up.

This will also allow us to impart financial strategies, tools and vehicles which will lead you and your family to good continued wealth building and a solid tax free retirement without expending any more money or adjusting your lifestyle. We can redirect your money to work for you instead of you working for it.

- Please have the name & ages for yourself, spouse and all your children
- Latest available annual Social Security statement, you can go to this [LINK](#) to sign up for social security statement.
- Copy of most recent Auto insurance policy
- Mortgage and Private Mortgage Insurance (*PMI*) information
- List of employment retirement plans in place for you and spouse
 - 401K or comparable retirement plan (*important--if employer matching, how much?*)
 - Company Pension Plan (*if any*)
 - Company Life/Health/Disability Insurance
- Copy of Personal Life Insurance Policy (*entire family*) **other than employer** (*if any*)
- Any previous employment retirement plans/packages:
 - 401K or comparable retirement plan
 - Company Pension Plan
- Any college tuition in place for children or College Funding Program
- Any other investments toward wealth building and or retirement
 - Real Estate or Commercial Property
 - Savings
 - Stocks, Bonds, Mutual Funds etc.
- Copy of credit report with all three bureaus and scores, this is very important.
- Most Recent Tax Return
- Do you have a will and/or a trust? We have a simple and inexpensive program to assist in setting up your will and/or trust as well as provide recommendations on how to eliminate debts, including mortgage faster.
- Budget is importantly needed. If you don't have a budget, click [HERE](#) to download a free budget app and complete

We are looking forward to meeting with you and becoming your partner in the development of a strong Financial Life Planning Strategy.

Quick Question:

How soon would you want to know something you need to know but do not know?