



## FINANCIAL DOCUMENTS CHECKLIST

At Nicole Cole Financial Services Group, LLC, we believe in taking a holistic approach to your financial health. In preparation for your meeting, please upload or bring all applicable documents below:

### Insurance

- Deductible on Health Insurance & Monthly Cost
- Life Insurance – In-Force Illustration or statement

### Income & Savings

- 1040 Tax Return (most recent available)
- Current Paystub (showing salary and bonus)
- Current Social Security statement
- Pension Statement
- Rental Statement
- Any other income

### Expenses


- 2 months of checking, savings and credit card statements or current budget

### Assets & Liabilities

- Market Value of Property (Real Estate, High Value Jewelry, Artwork & Vehicles)
- Physical address for your home & any rental properties
- Most recent statements for all financial accounts: 401(K), IRA's, Roth IRA, Individual Investment Accounts)
- Most recent statement or info on all liabilities (Mortgages, HELOC, Car Loans, Student Loans, etc.)



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# Your *Financial Journey* begins with a **first step**

