REDROCK
WEALTH MANAGEMENT

Statements & Information Helpful in Preparing your Financial, Retirement, & Investment Plans*

Most recent statements from:

- Trust Companies
- Investment Brokerage/Custodial Firms
- Banks
- Retirement Plans (IRA, 401k, Profit Sharing, etc.)
- Stock Options & Other Employer Plans
- Mortgage(s) (initial date, length, rate, term, principal)
- Personal Loans

Budgeting & cash flow items:

- Income Sources & Amounts (current & future expectations)
- Pension & Social Security Statements
- Expenses (current and future expectations)
- Large Expenditure Expectations

Insurance policies & statements (if applicable):

- Liability
- Disability
- Long-Term Care
- Life Insurance

Legal documents including:

- Wills
- Power of Attorney
- Trust Documents

List of other professional advisors (CPA, Attorney, Insurance, etc.)

Tax return from prior year

List of financial goals which take both money and planning to achieve

List of primary planning questions/concerns you have

*Only items specific to your personal financial planning needs & goals are necessary. Not all items listed will be relevant to your situation.