

FREE CHECKLIST

Documents to gather

Bring what you have to a conversation with us or with your attorney. You do not need everything on this list. Copies are fine; keep your originals.

Income and budget

- ☐ A rough monthly budget: what you spend in a typical month
- ☐ Your most recent Social Security statement (available from ssa.gov)
- ☐ Pension statements or estimates, if you have a pension
- ☐ A recent pay stub, if you are still working

Policies and contracts you already own

- ☐ Life insurance policies, including coverage through work
- ☐ Annuity contracts and the most recent annual statement for each
- ☐ Statements for retirement accounts, such as an IRA, 401(k) or 403(b)
- ☐ Long-term care or disability coverage, if any
- ☐ The beneficiary designation on file for each of the above

What you owe

- ☐ Mortgage statement showing the balance left
- ☐ Car loans, student loans and other loans
- ☐ Credit card balances

Estate documents, if you have them

We review these only to coordinate your insurance with your plan. We do not interpret them or give legal advice; your attorney does.

- ☐ Will
- ☐ Trust documents (first pages and the trustee and beneficiary sections are usually enough to start)
- ☐ Financial and health care powers of attorney
- ☐ Name and contact for your estate planning attorney and your tax professional

For a new life insurance application

- ☐ Driver's license or other photo ID (to show us, not to send)
- ☐ Names and dates of birth of the people you want to name as beneficiaries
- ☐ Your doctors' names and a list of current medications

Your questions

Write down what you want answered. No question is too basic.

WE ARE NOT A LAW FIRM

Apollos Planning is not a law firm. We are not attorneys, do not provide legal or tax advice, and do not prepare wills, trusts or other legal documents. We do not pay or receive referral fees from attorneys.