NIELSEN WEALTH MANAGEMENT GROUP

1425 W Elliot Rd #102
Gilbert, AZ 85233
Phone: (480) 497-4175
website:
www.nielsenwealthmanagement.com

FIRST APPOINTMENT

Documents Needed for Planning

Please bring **PHOTOCOPIES** of the following applicable documents to our meeting.
All information will be treated **CONFIDENTIALLY**.

Most Recent Payroll Stub(s), Earnings

- ❑ Self
- ❑ Spouse

Current Social Security Statement(s)

- ❑ Self (www.ssa.gov)
- ❑ Spouse (www.ssa.gov)

Income Tax Returns (past two (2) years)

- ❑ Self
- ❑ Spouse (if filing seperately)

Divorce Decree(s), Separations Agreement(s), and Prenuptial Agreement(s)

- ❑ Self
- ❑ Spouse

Wills / Trusts

- ❑ Self
- ❑ Spouse

Household Budget (optional)

- ❑ Fixed Expenses (mortgage, car payment, etc)
- ❑ Variable Expenses (groceries, gasoline, etc)

Savings and Investment Statements
(current statements preferred)

- ❑ 403(b) (Tax Sheltered Annuities)
- ❑ Mutual Funds/Savings Accounts/CD's
- ❑ IRAs / Roth IRAs
- ❑ Pension Plans / Profit Sharing / SERP
- ❑ Brokerage Accounts
- ❑ Health Savings Account
- ❑ Other

Insurance(s), Annuity Contracts and Annual Statements

- ❑ Life
- ❑ Disability
- ❑ Group Insurance
- ❑ Annuities (Variable, Fixed, and Index)
- ❑ Long-Term Care Plans