RETIREMENT PLANNING

Data Gathering Checklist

SURVEYS TO COMPLETE:

- ❒ Complete the Life-Planning Questionnaire
  - Couples: please each complete one separately
  - Access Password: PSP
- ❒ Complete the Risk Tolerance Questionnaire
  - Couples: please each complete one separately
  - Access Password: PSP

CONNECT ACCOUNTS IN PLANNING PLATFORM (RIGHT CAPITAL):

- ❒ Depository Accounts
  - Checking accounts
  - Savings accounts
- ❒ Investment Accounts
  - Taxable brokerage accounts
  - Non-retirement mutual fund investments
- ❒ Retirement Accounts (including)
  - 401(k) and other workplace retirement accounts
  - Individual Retirement Arrangement (IRA) accounts
- ❒ Loan Accounts
  - Mortgage & HELOC loan
  - Auto loans
  - Credit Card accounts with balances or regularly used
- ❒ *Manually enter information for major assets or liabilities not connected*

DOCUMENTS TO UPLOAD (FOLDER ICON IN PLANNING PLATFORM)

- ❒ Social Security Statement available at ssa.gov/myaccount/
  - Here is a sample of the document
- ❒ 401(k) (or other plan) Plan Documents (available from HR or 401(k) provider)
  - Investment options
  - Summary plan description
- ❒ Recent statements for retirement and investment accounts
- ❒ Pension documents including summary of benefits and current statement
  - Available on the pension site or from the pension administrator
- ❒ Annuity contract summaries & recent account statement(s)
- ❒ Summary Documents for non-traditional investments
  - E.G. real estate, private companies, or other investments
- ❒ Recent statements or in-force illustrations for cash balance life insurance
  - Whole life, universal life, and other variation