



Real Financial Planning, LLC

----- **Retirement Planning Checklist** -----

- Mutual fund account statements**
- Brokerage account statements**
- Retirement account statements**
- Prior year tax return**
- Social Security benefit reports**
- Pension documents**
- Paystubs**

Optional:

- Insurance policies:**
 - Homeowners**
 - Auto**
 - Long term care**
 - Life**
 - Disability**
- Loan documents**
- Trust documents**
- Wills**