

# NEW DIMENSIONS WEALTH MANAGEMENT

## FINANCIAL PLANNING PROCESS

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A financial plan is a continual work in progress. You should update your financial plan anytime you need to make important financial decisions and/or annually to stay on track.

During the financial planning process, you will gather important financial documents such as the ones listed below. Some of these documents will be helpful as you complete the secure on-line questionnaire. Other documents will be reviewed as your financial plan is being created.

The financial planning process takes approximately 10 business days once you submit your completed questionnaire and provide your documents. The goal is to build something that helps you make decisions so please include as much information and as many questions as necessary.

Your financial plan will address the following areas: Retirement Planning, Risk Management, Estate Planning, Cash Flow Management, Goal Planning, Tax Planning, Portfolio Analysis (current / recommended portfolios), and anything else that is important to your financial plan.

\*We do not provide tax or legal advice; however, we will coordinate with your CPA and Attorney to make sure your plan makes sense for you.

## FINANCIAL PLANNING CHECKLIST

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- Investment Statements - Please provide actual statements including ownership/account title and individual asset information such as price, quantity, cost basis and ticker symbol.
- Insurance Policies - Life, Disability, Home & Auto, Umbrella, Health, Long-term Care (the disclosure page is sufficient in most cases).
- Tax Return - Last filed.
- Social Security Statements - Most recent (including income history).
- Pension Statements - Government, Military, Corporate, Non-profit, etc.
- Estate Documents - Wills, Trusts, Power of Attorney, Medical Directives, HIPAA designations, etc.
- Beneficiary Designations - Retirement Accounts, Insurance Policies, etc.
- Employee Benefits/Income - Current paystub, list of employee benefits.
- Anything else that pertains to your financial situation.