Document Checklist

Price Wealth Management
Affiliated with
Naples Wealth Planning℠

At Price Wealth Management, we are registered fiduciary advisors who put your best interests first. We are compensated by a level fee, not commissions. Consequently, our advice is product-neutral and conflict-free. Moreover, we have the experience, credentials, and resources to provide what you need. And you will like our personal service as well.

Contact Information

Name(s):	
Phone #(s):	
Email Address(es):	

Liquid Assets

	His	Hers	Both
Qualifying Retirement Plans			
401(k), 403(b), 401(a)	☐	☐	☐
Profit Sharing	☐	☐	☐
Brokerage Account Statements			
Joint	☐	☐	☐
Single Name	☐	☐	☐
Traditional IRA	☐	☐	☐
SEP IRA	☐	☐	☐
SIMPLE IRA	☐	☐	☐
Roth IRA	☐	☐	☐
Rollover IRA	☐	☐	☐
Inherited IRA	☐	☐	☐
Revocable Trust	☐	☐	☐
Charitable Trust	☐	☐	☐
Savings Account Statements			
Joint or Single Name	☐	☐	☐
Certificates of Deposit (CDs)	☐	☐	☐
Annuity(ies)	☐	☐	☐
Health Savings Account (HSA)	☐	☐	☐

Illiquid Assets

	His	Hers	Both
Real Estate (please note estimated value and titling)	☐	☐	☐
Private Business Interest	☐	☐	☐
Intra-family & Other Private Loan	☐	☐	☐
Collectibles, list including value	☐	☐	☐

Estate Documents

	His	Hers	Both
Will	☐	☐	☐
Trust	☐	☐	☐
Durable Power of Attorney	☐	☐	☐
Medical Power of Attorney	☐	☐	☐
Living Will	☐	☐	☐

Insurance

	His	Hers	Both
Life	☐	☐	☐
Disability	☐	☐	☐
Umbrella	☐	☐	☐
Professional Liability Coverage	☐	☐	☐

Retirement Income Sources

	His	Hers	Both
Social Security Benefit Statement	☐	☐	☐
Pension, include Benefit Options	☐	☐	☐
Umbrella	☐	☐	☐
Professional Liability Coverage	☐	☐	☐

Debt

Mortgage(s)	☐
Home Equity Line of Credit	☐
Auto	☐
Personal	☐
Other	☐

Other

Tax Return	☐
Expected Inheritance?	☐
College Savings Account Statements (e.g. 529 Plans, Coverdell, UTMA)	☐
Stock Held in Certificate Form	☐

Spending Needs

Monthly or Annual	

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Notes

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