meridian

NORTHWESTERN MUTUAL
PRIVATE CLIENT GROUP

PLANNING CHECKLIST

Client Name(s): ______________________________

Date of Meeting: ___________________

PLEASE HAVE COPIES OF THE FOLLOWING (IF APPLICABLE) FOR OUR MEETING

- ☐ Current social security income projection for retirement
- ☐ Most recent tax return
- ☐ Year-to-Date paystub

EMPLOYEE BENEFITS (IF APPLICABLE)

- ☐ Group Life Insurance (amount of coverage)
- ☐ Group disability insurance (amount of coverage/cost; employer- or employee-paid)
- ☐ Supplemental life or disability coverage (amount of coverage/cost; employer- or employee-paid)
- ☐ Stocks, options, restricted stock options
- ☐ Other employer-provided insurance benefits

RETIREMENT PLANS (MOST RECENT STATEMENTS/PLAN INFORMATION)

- ☐ 401k/profit sharing (your % contribution, employer's matching contribution)
- ☐ Pension plan, state retirement plan details (years of service, benefit start date)
- ☐ IRAs (Roth, traditional)
- ☐ Other

MOST RECENT ACCOUNT STATEMENTS

- ☐ Savings Account/Money market
- ☐ Checking account
- ☐ Brokerage account
- ☐ CDs (maturity dates/bank/rate of interest)
- ☐ Stocks
- ☐ Bonds
- ☐ Mutual funds
- ☐ Real estate holdings
- ☐ College savings for children

INDIVIDUALLY OWNED LIFE INSURANCE OR DISABILITY INCOME POLICIES

- ☐ Annual statements
- ☐ Coverage amount/type of policy/company

QUESTIONS TO THINK ABOUT PRIOR TO OUR MEETING

What goals are most important to you in the next 1-3 years? 5-10 years? 20+ years

What does "retirement" mean to you?

When would you like to retire?

How much income do you want to receive (in today's dollars) during retirement?

How much after-tax income do you need today, on a monthly basis, to maintain your standard of living?

What kind of legacy do you want to leave behind when you are gone?