FLOURISH
FINANCIAL PLANNING

Information Collection

Creating a holistic financial plan can be far reaching. Financial decisions don't happen in silos - each will have an implication for other areas. *Eg. investment trades can impact your tax situation, or your insurance and retirement decisions could impact your estate plan.*

As such, it is important for us, as your advisor, to gather as much information as we can, in order to create a comprehensive plan. **Don't stress if you have trouble gathering some of this information,** we will work around it.

General Documents

- Budget or spending breakdown
- Executive compensation information
- Bank account balances

Tax Documents

- A recent tax return
- Recent paystubs
- Business financials

Investment Documents

- Brokerage account statements
- Retirement account statements

Insurance Documents

- Life insurance summary documents
- Home, auto, and umbrella summary documents

Estate Documents

- Will
- Trust documents
- Living will, HIPAA, and ancillary documents

Flourish-FP.com | Hello@Flourish-FP.com | (817) 799-7699
1701 W Northwest Hwy, Ste 100, Grapevine, TX 76051