

## Advance Financial Review

To best assist you during your Advance Financial Review appointment, it is important to get the most complete financial picture possible. Use this checklist as a guide for what to bring with you to your appointment. Please bring as much of the information as you have available. If you have already entered the information into the Advance program and want to reference it during your appointment, please bring your PC Branch login and password information.

### Assets and Values (Include interest rates and terms when applicable.)

#### Cash

- Checking Accounts
- Savings Accounts
- Life Insurance
- Money Market Accounts
- Other

#### Real Estate/Property

- Home (Primary Residence)
- Land
- Other

#### Investments

- Annuities
- Certificates of Deposit
- Individual Retirement Accounts (IRA's)
- Mutual Funds
- Pension Plans
- Retirement Plans (e.g. 401(k))
- Stocks and Bonds
- Other

#### Personal Property

- Appliances
- Collections/Collectibles
- Furniture
- Jewelry
- Recreational Vehicles
- Vehicles (Cars/Trucks/Minivans/Vans)
- Other

### Debts (Include balance due, monthly payment, interest rate and payoff date.)

#### Loans

- Education
- Jewelry
- Personal (financial institutions)
- Personal (family or friends)
- Recreational Vehicles
- Vehicles (Cars/Trucks/Minivans/Vans)
- Other

#### Mortgages

- First Mortgage
- Home Equity Loan
- Land Loan
- Second Mortgage
- Other

#### Credit Cards

- Back Taxes
- Legal
- Medical
- Other

### Budget Information - Monthly income and payments

#### Income

- Gross Income from Employment
- Net Income from Employment
- Alimony
- Child Support
- Social Security
- Other Income

#### Fixed Expenses

- Cell Phone
- Child Care
- Education
- Insurance Premiums
- Internet
- Personal Loans
- Prescriptions
- Television Service (Cable, etc.)
- Vehicle payment
- Other

#### Variable Expenses

- Clothing
- Donations
- Entertainment
- Food-groceries
- Food-eating out
- Gas-vehicles
- Gifts
- Home Improvements
- Household Supplies
- Personal Care
- Pets
- Phone
- Utilities
- Other