

GETTING ORGANIZED

- 1 Use this list to **collect all appropriate documents** for each planning phase to see the big picture of your financial plan
- 2 Go to craftedfinance.com/myplan to quickly **register an account*** and access your Crafted Finance profile
- 3 **Complete the online questionnaire** for each planning phase and securely upload appropriate documents

PHASE 1 Goals | Balance Sheet | Cash/Flow Budget | Savings

Available for Account View

- [Recent Account Statements](#) (*banks, brokerages, retirements, stocks, annuities, kids' accounts, etc.*)
- [Recent Debt Statements](#) (*mortgages, home equities, credit cards, student loans, etc.*)
- Two Recent Paystubs
- Household Budget

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PHASE 2 Investments | Retirement | Education

- Social Security Statement
- Pension Estimate
- Appraisals (*business valuations, rare assets*)

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PHASE 3 Insurance | Employer Benefits

- [Employer Provided Retirement](#) (*investment menu, fee disclosure, plan summary*)
- [RSU/Stock Award Vesting Schedule](#)
- [Personal Life, Disability, Long-Term Care or Annuity Policy Declaration](#)
- Employer Benefit Summary (*health, life, disability, hsa, fsa, long-term care, etc.*)
- Stock Options (*plan document summary*)
- Insurance Declarations (*auto, homeowner's, renter's, umbrella, gap, etc.*)

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PHASE 4 Tax Planning | Asset Shifting | Estate & Gift Planning

- Tax Returns (*last two years*)
- Copies of Will & Other Legal Documents
- Year-to-Date Contributions to Retirement Accounts

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* You may receive a welcome email from PreciseFP. Accounts, profiles, and questionnaires are powered by 

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