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# Financial Review Prep Checklist

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*Get the most from your next HLG review*

*"Preparation is half the decision."*

Jordan Hyde, Founder

## Contents

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- 1. Documents to Gather.....>
- 2. Life-Change Triggers.....>
- 3. Fillable Worksheet.....>
- 4. Questions to Consider.....>
- 5. Your Top 3 Priorities.....>

# 1. Documents to Gather

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The best reviews start with the same information on both sides of the table. Before our next meeting, check the box next to each item as you pull it.

## ***Income***

- Most recent two pay stubs (if W-2)
- YTD P&L (if self-employed)
- Social Security benefit statement (from [ssa.gov/myaccount](https://ssa.gov/myaccount))
- Pension statement, if applicable

## ***Accounts***

- Most recent statement for each retirement account (401k, 403b, IRA, Roth)
- Most recent statement for each taxable investment account
- HSA and 529 statements, if applicable
- Cash account balances (checking, savings, money market)

## ***Taxes***

- Most recent federal tax return (Form 1040 and all schedules)
- State tax return
- Any new 1099s, K-1s, or correspondence from the IRS

## ***Insurance***

- Declarations pages for home, auto, and umbrella policies
- Life insurance policy summaries
- Long-term care policy, if applicable

## ***Estate***

- Copy of current will
- Copy of trust document, if applicable
- Healthcare and financial powers of attorney
- Beneficiary designations on retirement accounts and insurance

## 2. Life-Change Triggers

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Mark any that apply since your last review. Each one typically changes at least one thing in your plan.

- Marriage, divorce, or remarriage
- Birth or adoption
- Death in the immediate family
- New job, promotion, or significant income change
- Retirement date set or moved
- Move to a new state
- Purchase or sale of a home, business, or major asset
- Inheritance received or anticipated
- New health diagnosis affecting work or longevity
- Change in a beneficiary's circumstances (marriage, disability, divorce)

### **THE HLG VIEW**

If you marked three or more, bring this checklist to the review. We may need a longer session.

### 3. Fillable Worksheet

Fill this out to the best of your memory. We will firm the numbers up together.

#### **Basic info**

**Name(s)**

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**Date of this review**

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**Target retirement age**

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**Target monthly spending in retirement**

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#### **Net worth snapshot**

Category	Estimated value
Retirement accounts (all)	
Taxable investment accounts	
Cash and equivalents	
Home equity (market value minus mortgage)	
Other real estate	
Business interests	
Other assets	
Total mortgage balance	
Total other debt	
Estimated net worth	

#### **What is on your mind?**

**What is the one question you want answered at this review?**

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**What has changed since we last met?**

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## 4. Questions to Consider

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You do not need an answer to any of these. They are just a starting point. Circle the ones that matter most for your meeting.

- Am I saving enough, and in the right places?
- Is my tax plan working for me this year?
- When should I start Social Security, and why?
- Do I have the right amount of insurance, or too much?
- Is my estate plan current?
- Are my beneficiary designations current?
- Could we be doing more to reduce taxes in retirement?
- Is my withdrawal strategy going to hold up in a down market?
- Do my adult children know where things are?
- What would you do if you were me?

## 5. Your Top 3 Priorities

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Narrow it to three. We will tackle those first.

**Priority 1**

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**Priority 2**

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**Priority 3**

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**Bring this to your review**

Hit print. Clip it to the documents. Bring both. The better the prep, the sharper the session.

## Disclosures

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Prepared by Hyde Legacy Group for its clients. Educational only. Not tax, legal, or insurance advice. Information exchanged during reviews remains confidential per our engagement terms.