Shorepoint
Capital Partners LLC

Identifying Opportunity.
Navigating Risk.

Information to Review at a Financial Planning Appointment With Shorepoint Capital Partners LLC

✓Assets:

- ☐ Bank account balances
- ☐ Brokerage and mutual fund account balances
- ☐ Other assets (such as real estate, company stock/options, private investments, etc.) including current value, income, etc.

✓Liabilities & Cash Flow needs:

- ☐ Estimated monthly expenses
- ☐ Outstanding debt including mortgage debt

✓Retirement planning:

- ☐ Plan balances, contribution levels, and any company match
- ☐ Pensions
- ☐ Most recent social security statements
- ☐ Annuities

✓Insurance:

- ☐ Life insurance
- ☐ Disability and long term care
- ☐ Umbrella liability insurance

✓College savings account balances

✓Estate Planning Summary

✓Tax Information (income, tax bracket, loss carryforward, etc.)