



## CHECKLIST

What you need in order to do the most accurate financial plan possible

Ready to make an intelligent financial or retirement plan? Start by gathering data. Like any analysis, the better the input, the better the output. Here's a checklist of the types of information you will need to bring to your financial planner. Feel free to use the "Financial Snapshot" tool at [www.RichAsAKing.com/snapshot](http://www.RichAsAKing.com/snapshot).

- Life expectancy (you and your spouse)
- Health summary (are you a smoker?)
- Children
- Salaries
- Special income (inheritances, gifts, royalties, annuities, distributions from trusts)
- Tax situation
- Inflation expectations
- Net worth including taxable and tax-deferred savings plans
- Asset allocation
- Life insurance
- Long-term health insurance
- Budget
- Pensions (including Social Security, Bituach Leumi, and others)
- Risk tolerance
- Learn about Monte Carlo Simulation with the 7 minute video here: [www.richasaking.com/monte-carlo-video/](http://www.richasaking.com/monte-carlo-video/)

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- understand the basics of personal finance (budget better, save more, avoid debt),
- learn investment strategies from the world's best investors,
- improve your retirement plan, and
- build healthy financial habits.



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