

At Price Wealth Management, we are registered fiduciary advisors who put your best interests first. We are compensated by a level fee, not commissions. Consequently, our advice is product-neutral and conflict-free. Moreover, we have the experience, credentials, and resources to provide what you need. And you will like our personal service as well.

Contact Information	
Name(s):	
Phone #(s):	
Email Address(es):	

Liquid Assets			
	His	Hers	Both
Qualifying Retirement Plans			
401(k), 403(b), 401(a)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Profit Sharing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brokerage Account Statements			
Joint	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Single Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traditional IRA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEP IRA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SIMPLE IRA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roth IRA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rollover IRA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inherited IRA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Revocable Trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charitable Trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Savings Account Statements			
Joint or Single Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Certificates of Deposit (CDs)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Annuity(ies)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health Savings Account (HSA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Illiquid Assets			
	His	Hers	Both
Real Estate (please note estimated value and titling)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Private Business Interest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Intra-family & Other Private Loan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collectibles, list including value	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Estate Documents			
	His	Hers	Both
Will	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Durable Power of Attorney	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medical Power of Attorney	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Living Will	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Insurance			
	His	Hers	Both
Life	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Umbrella	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional Liability Coverage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Retirement Income Sources			
	His	Hers	Both
Social Security Benefit Statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pension, include Benefit Options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Debt	
Mortgage(s)	<input type="checkbox"/>
Home Equity Line of Credit	<input type="checkbox"/>
Auto	<input type="checkbox"/>
Personal	<input type="checkbox"/>
Other	<input type="checkbox"/>

Other	
Tax Return	<input type="checkbox"/>
Expected Inheritance?	<input type="checkbox"/>
College Savings Account Statements (e.g. 529 Plans, Coverdell, UTMA)	<input type="checkbox"/>
Stock Held in Certificate Form	<input type="checkbox"/>

Spending Needs	
Monthly or Annual	

Notes