Ready To Get Going?

crafted finance

GET SUBMITTING — Send us your financial documents.

GET ORGANIZING — Meet us to review your goals.

GET PLANNING — Join us as we present your plan.

GET GOING — Trust us as we guide your wealth.

Let's Get Submitting!

(Please Submit All That Apply Through Our Secure ShareFile)

BASICS

- **PAYSTUBS:** Information from your two most recent paychecks works perfectly.
- **BUDGETS:** If you don't have a budget, don't worry about it! But if you do, please share a scanned copy of your handwritten budget or a spreadsheet.
- **DEBTS:** Provide a statement on any student loans, mortgages, home equities, credit cards, etc.
- **TAXES:** Send over your two most recent federal and state tax returns.
- **BANK ACCOUNTS:** We just need a breakdown of the cash you have on hand. You can send us a screenshot of your bank(s) balances, most recent statements, or even a scanned document with your various balances written down.

INVESTMENTS

- **BROKERAGE ACCOUNTS:** We'll need your formal statements sent over.
- **STOCK OPTIONS:** Here, we need to see your vesting schedule. This includes both vested, and still to be vested, assets for non-qualified and incentive stock options. Your employer should be able to help you locate this information if you're unsure.
- **EMPLOYER STOCK:** We need to know your number of shares, cost basis per share, and date(s) of purchase. It's also crucial to have the discount, and offer period information for your employer stock purchasing plan. Just do the best you can here, we know it's confusing!
- **EMPLOYER RETIREMENT ACCOUNTS:** Formal plan statements for any employer retirement account (ex: 401k, 457, 403b, etc.) must be sent over. And, if you can, also share your menu of investments, fee disclosure, and summary plan description.
- **PERSONAL RETIREMENT ACCOUNTS:** The most recent statement from your Roth IRA, traditional IRA, etc. will work perfectly.
- **EDUCATION ACCOUNTS:** Please share the formal statement of any educational accounts you have open (ex: 529 Plan).

INSURANCE

- **INSURANCE DECLARATIONS:** We'll want to take a look at your individual auto, health, life, homeowner, renter's, umbrella, gap, etc. insurance policy information.
- **EMPLOYER BENEFITS:** Many employers offer a summary of the benefits you've elected. Please share them with us. Oh, and if you have an employer benefit brochure, we'd love to look at that too!

OTHER

- **SOCIAL SECURITY STATEMENT:** You can access your statement by logging into your my Social Security account at www.ssa.gov. If you don't already have an account, now's a good time to go ahead and create one for future access.
- **PENSION ESTIMATE:** Does your employer provide a defined benefit pension? If so, please provide us with an estimate. This is something we can do together, if you feel unsure.
- **TRUSTS & WILLS:** We just need a copy of the electronic document. Or, if it's in a drawer or folder somewhere, send us a scanned copy.
- **OTHER PERSONAL PROPERTY & INVESTMENTS:** Let us know if you own any land, mineral rights, family business ownership, art, cryptos, NFTs, etc.

If You're Overwhelmed, It's Okay. We Get It!

Just send us what you can. We'll cover gaps in your Get Organized meeting.
But keep in mind:

- Get Organized meetings are most effective when info is shared **3-5 days** before.
- You can email us directly at dionne@craftedfinance.com with any submission questions, or
- You can book a 15-minute support call for further guidance.

BOOK CALL