VITUCCI INTEGRATED PLANNING

Integrated Planning Periodic Update

Client Household Name:

____

Meeting Date:__________

Fiscal Fitness Update

	Current
Household Income Sources: (e.g., Earned Income, Pension, Real Estate, SSI, etc.) (if not receiving SSI or Pension, please check full retirement age amount)	________________ ________________ ________________ ________________
Household Expenses	________________
New Periodic or Planned Expenses	___________ ___________
Total Aggregate Cash Balances (total outside of investment accounts)	_________________
Set Savings & Retirement Plan Contributions	_________________ _________________

iPlan Use:

Account Feeds

Do you have outside accounts feeding into iPlan? ☐ Y ☐ N

If yes, please have your login credentials available for your meeting. **If not, please provide balances below for held away assets:** Retirement accounts: _____________ _______________

Taxable Accounts: _____________ _______________

Document Vault

Last Tax Return Year on File: ________ Estate Docs on File: ☐ Y ☐ N

Please feel free to bring other items for us to add to your Vault

Other Planning Updates

☐ Home Sale/ Purchase	☐ Change to Retirement Date/Status	☐ Adjustment to Estate Docs/ Beneficiaries
☐ Job Change	☐ Business Sale	☐ New Insurance Policy
☐ Home Refinance (Refi, Rev. Mort.)	☐ Stock Options	☐ Employee Benefit Options
☐ Marriage/Divorce	☐ Birth of Child/Grandchild	☐ Other: ________________ ________________ ________________

Please come to your meeting with financial parameters for any of these life events.

Other Concerns you wish to discuss today:

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