VITUCCI INTEGRATED PLANNING

# Integrated Planning Periodic Update

Client Household Name:

______________________________

Meeting Date:______________

## Fiscal Fitness Update

Current Amounts

Household Income Sources: ______________________ SSI: ____________________
(e.g., Earned Income, Pension, ______________________
Real Estate, SSI, etc.) ______________________
(if not receiving SSI or Pension, please check full retirement age amount) ______________________

Regular Household Expenses ______________________

New Periodic or Planned Expenses ______________________ ______________________

Total Aggregate Cash Balances ______________________
(total outside of investment accounts)

Set Savings & Retirement Plan Contributions ______________________

______________________

**Held away investments:** Retirement accounts: ____________________ ____________________

Taxable Accounts: ____________________ ____________________

## Client Planning Portal Use:

**Account Feeds (aggregation)**

If you use account aggregation features in iPlan, please try to make sure accounts are updating properly or have your login credentials available for your meeting.

**Document Vault**

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

## Critical Documents for Review:

**Most Recent Tax Return**
A copy of your most recent Tax Return can be provided to us for possible Tax Planning. This can be a hard copy brought to your meeting or an uploaded digital copy to your online doc vault. (please disregard if you use our tax service)

**Estate Document Update**
Have you recently updated your Estate Docs?

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## 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:

______________________________________________________

______________________________________________________