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1 Financial Data Onboarding Checklist

Financial Data Onboarding Checklist

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Task	Due Date
Enter all Family members that are dependents with dates of birth, including yours (Profile - Family)	Initial due date + 3 d
Link up all BANK ACCOUNTS (Profile - Net Worth - Link Accounts)	Initial due date + 3 d
Link up all CREDIT CARD ACCOUNTS (under Profile - Net Worth - Link Accounts)	Initial due date + 3 d
Enter information on all LIFE INSURANCE POLICIES (Profile - Net Worth - Add Account - Insurance)	Initial due date + 3 d
Enter information on all DISABILITY INSURANCE POLICIES (Profile - Net Worth - Add Account - Insurance)	Initial due date + 3 d
Enter information on all LONG-TERM CARE INSURANCE POLICIES, if applicable (Profile - Net Worth - Add Account - Insurance)	Initial due date + 3 d
Link up all RETIREMENT/INVESTMENT ACCOUNTS, such as IRAs, Roth IRAs, 401(k) plans, brokerage accounts, etc. (under Profile - Net Worth - Link Accounts)	Initial due date + 3 d
Enter all LOANS, such as mortgage, car loans, student loans, etc. (Profile - Net Worth - Link Accounts)	Initial due date + 3 d
Confirm status of your PRIMARY RESIDENCE and select Own or Rent. If "Rent", enter rent amount. If "Own" enter home information. (Profile - Net Worth - Property section on the left)	Initial due date + 3 d
Enter any ADDITIONAL PROPERTY, if applicable (Profile - Net Worth - Add Account - Property)	Initial due date + 3 d
Add any BUSINESSES, if applicable (Profile - Net Worth - Add Account - Other)	Initial due date + 3 d
Enter all INCOME (Profile - Income - Add Income)	Initial due date + 3 d
Enter your current SAVINGS RATES for any retirement and investment accounts (Profile - Savings - Add Saving)	Initial due date + 3 d
Enter your current MONTHLY EXPENSES (Profile - Expenses - Living Expenses Card)	Initial due date + 3 d
Upload latest three years TAX RETURNS to the Vault (Three Dots in Menu - Vault)	Initial due date + 3 d

Task	Due Date
Upload latest PAY STUB to the Vault, if applicable (Three Dots in Menu - Vault)	Initial due date + 3 days
Upload latest RETIREMENT/INVESTMENT ACCOUNT STATEMENTS for all accounts to the Vault (Three Dots in Menu - Vault)	Initial due date + 3 days
Upload most recent WILL/TRUST AND ESTATE DOCUMENTS to the Vault, including POAs, health care directives, etc. (Three Dots in Menu - Vault)	Initial due date + 3 days
Upload most recent AUTO & HOME INSURANCE DECLARATIONS PAGES to the Vault (Three Dots in Menu - Vault)	Initial due date + 3 days