

Get ready to build your financial plan with a CERTIFIED FINANCIAL PLANNER™ professional.



Preparation counts when you're creating your Schwab Intelligent Portfolios Premium® plan. Review the checklist below to make the most of our planning tool and your appointment with a CFP® professional to develop a smarter, more informed financial plan.

Information you'll be asked to share:

- ☐ Basic information about your income, children, and beneficiaries.
- ☐ Your expectations and concerns regarding your financial future.
- ☐ Your short- and long-term personal and financial goals.
- ☐ Your current approach to saving and reaching your financial goals.
- ☐ Details about your assets and liabilities.
- ☐ Your tolerance for financial risk.

Don't forget to:

- ☐ Invite your spouse or partner to participate in the plan from the beginning to get a holistic view of your finances.
- ☐ Share all your financial goals, not just retirement (for example, home renovations, healthcare, college, travel, etc.).
- ☐ Include all assets, such as brokerage and 401(k) accounts, inheritance, checking and savings accounts, property and relevant insurance information (life, etc.).
- ☐ Include major liabilities, such as a mortgage, business loans, credit cards, and auto and student loans.

Time-saving tips:

- ☐ Have your login credentials for outside financial institutions handy. Securely linking all of your accounts with our tool will save time and give you real-time accuracy and results.
- ☐ Your latest tax return can be a helpful reference to have while developing your financial plan.
- ☐ We will conduct your appointment using WebEx. Allow yourself extra time to set up WebEx if you're unfamiliar with it.

Final note:

Don't worry if you do not have all the answers or if you feel concerned about the plan results. You'll be meeting with a CERTIFIED FINANCIAL PLANNER™ professional who can answer your questions and help you complete your plan.

Please read the Schwab Intelligent Portfolios Solutions [disclosure brochures](#) for important information, pricing, and disclosures relating to Schwab Intelligent Portfolios and Schwab Intelligent Portfolios Premium programs.

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