

Getting Started

Now that you've shared your story with us, it's our job to build a financial plan that will support your next chapters.

To get started, look for an e-mail titled “**Register for Your Financial Website**” from your CornerCap Wealth Strategist. Using that link, you will be guided through a process to sync existing financial accounts and securely upload documents. Your CornerCap team will use these inputs to inform your financial plan.

What to Expect:

Your story is much more than your net worth. So even while we're transitioning into the net worth part of this process, we still put your story first. That's why you'll first be asked to share what specific financial topics weigh most heavily on your mind – prioritizing them so we know what to tackle first.

We'll also ask you to confirm what's keeping you awake at night – which could be consistent with what you've already shared, or something new that's popped up since you first shared your story.

You'll outline which members of your family should be included in your financial plan and share your family's income streams, assets and liabilities.

At this stage, you'll also start attaching numbers to the Life Appreciates goals you've outlined.

You'll do this by:

1. Linking your banking and investment accounts to the portal when prompted
2. Uploading documents to the Vault – Shared Documents area of your personal site

What You'll Link / Upload:

Managing Household Cash Flow

- Banking and savings accounts, including your emergency fund
- Monthly household budget (or itemized list of monthly expenses)
- Pay stub with gross / net income details and any pre- or post-tax contributions (such as 401(k), Health Savings Account, Dependent Care Flexible Spending Account)
- Tax returns for the last two years
- Debt statements: mortgage, credit card (anything exceeding what you pay off monthly), student loans, business loans, car note, personal loans

Planning for the Future

- 529 plan statements
- Most recent monthly or quarterly investment statements for all brokerage, 401(k) or 403(b) and IRA accounts
- Employer benefits statements; examples include stock bonus plans or company-sponsored pensions

Securing Your Family

- Copies of insurance policies (life, health, disability, long term care, home, auto, umbrella)
- Social Security Benefit Statement (if you have not received a recent copy, call (800) 772-1213 to request a current statement)
- Health Savings Account statement
- Estate planning documents: will, trust, power of attorney, healthcare power of attorney