



620 Mabry Hood Road, Suite 102  
Knoxville, TN 37932  
ph 865.675.8496  
fax 865.675.8499  
www.VisionaryHorizons.com

## Data Gathering Checklist

Please take a moment to collect the following documents and answer the following questions.

### Personal Information

- Current financial statements for all bank accounts, investment accounts, IRAs, 401(k), stocks, bonds, mutual funds, annuities, cash accounts, etc.
- Pay stubs
- Income tax return
- Pension information
- Social Security statements
- List of debts (mortgage, auto, credit card, etc.)
- Budget of personal and living expenses
- Current wills and trust agreements
- List of all real estate (home, rental, etc.)
- Current statements of insurance policies (life, disability, or long-term care, etc.)
- Other relevant personal documents, such as:

---

---

---

---

---

---

### What is most important to you?

#### Short-Term Goals

---

---

---

---

---

#### Long-Term Goals

---

---

---

---

---

**Please fax, email, or mail the information to our office:**

*Fax: 865-675-8499*

*Email: [info@visionaryhorizons.com](mailto:info@visionaryhorizons.com)*

Visionary Horizons Wealth Management is a Registered Investment Advisor that requires clients establish fee based accounts with the Schwab Institutional® division of Charles Schwab & Co., Inc. (Schwab), a FINRA-registered broker-dealer, member SIPC, to maintain custody of clients' assets and to effect trades for their accounts. Visionary Horizons Wealth Management is independently owned and operated and not affiliated with Schwab.

Securities offered through Pursho Kaplan Sterling Investments, Member FINRA/SIPC. Headquartered at 18 Corporate Woods Blvd., Albany, NY 12211. Not FDIC Insured. Not Bank Guaranteed. May lose values, including loss of principal. Not insured by any state or federal agency.