



# Complete Scorecards?

What information do you *actually* need for a complete view of financial vitals—and what's nice to have?

## Needed...

- Balance sheet
- Total Annual Income
- Total Annual Spending
- Savings Amounts & Frequency, by account
- Debt Payments, by account
- Annual Taxes Paid
- Life, Disability & Umbrella Insurance Coverage Amounts
- Equity Allocation on Investment Accounts

## Nice-to-Have...

- Ownership Percentages on Balance Sheet Items
- Income by Source
- Other Debt Details, Like:
  - Interest Rate/Type
  - Loan Length
  - Original Loan Amount
  - Extra Debt Payments
- Additional Insurance Data
- Goals & Values