Onboarding Checklist

This list will help you gather the information we need for Elements. Having these details ready will make onboarding smoother and more efficient!

Needed Data

- Asset balances such as cash accounts, 401ks, IRAs, investment accounts
- Savings amounts and frequency by account
- Debt balances such as mortgages, car loans, student loans
- Debt payments by account and frequency
- Total income
- Annual spending estimate
- Life, disability, and umbrella insurance coverage amounts

Nice to Have Data

your advisor will likely ask you for this data at some point

- Previous years tax return
- Most recent investment statements (401k, IRA, etc.)
- Other debt details:
  - Interest rate
  - Loan length
  - Original loan amount
  - Extra debt payments
- Additional insurance data such as term, type of policy, premium, etc.