DATE: ______/_______/_______

The privacy and confidentiality of your personal information is very important to us. We adhere to all privacy and confidentiality requirements for all entities whose products or services we offer.

Welcome!

Thank you for deciding to entrust Jackson Wealth Strategies with your financial planning work. We are excited to work with you and help you develop a plan, in a language you understand, that aligns with the things you value most.

Below is a checklist of the additional information we need from you in order to guide you through our planning process. Seeing your whole financial picture allows us to deliver the best guidance. And we understand that time is a precious resource – so the more information we have early in the process, the more productive we can be during our time together. We appreciate the time and effort it takes to compile this info.

Our primary tool to share data securely is the eMoney Client Website. We refer to this as our Client Portal. Below are instructions on how to upload documents to your secure vault as well as how to link accounts directly. Linking accounts is important because it provides real-time information for our analysis, allows us to keep your plan current and provides you with an up-to -date snapshot of your financial picture through the website. An invitation to setup your client website will be emailed to you.

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Please provide the following:

- ☐ Copy of Driver's License(s)
- ☐ Investment & Bank Accounts Monthly Statements (most recent)
- ☐ Mortgage Statement
- ☐ Paystubs (most recent)
- ☐ Tax Return (most recent)
- ☐ Legal Documents (will, power of attorney, trust, etc.)
- ☐ Life Insurance Details – Statement or Policy Summary
- ☐ Risk Tolerance Questionnaire
- ☐ Cash Flow Summary (complete the attached or provide your own if you track expenses differently)
- ☐ Social Security Statement (most recent)

Link the following in Client Portal:

- ☐ Investment Accounts
- ☐ Bank Accounts
- ☐ Mortgage
- ☐ Any other liabilities

Client Portal Instructions

Saving Documents to your Vault

1. Once you are logged into the site, navigate to and click on the "Vault" tab across the top.
2. Choose the Shared Documents folder by clicking on "Shared Documents"
3. Click the blue Upload button and chose file.
4. Navigate to the file you would like to upload and open.

Linking Accounts

1. Once you are logged into the site, navigate to and click on the "Organizer" tab across the top.
2. Choose Accounts on the left-hand side.
3. Click the blue Add button in the upper right corner.
4. Search for your institution name or website for login.
5. Choose the correct link and enter the credentials as requested.
6. Follow additional prompts to complete linking