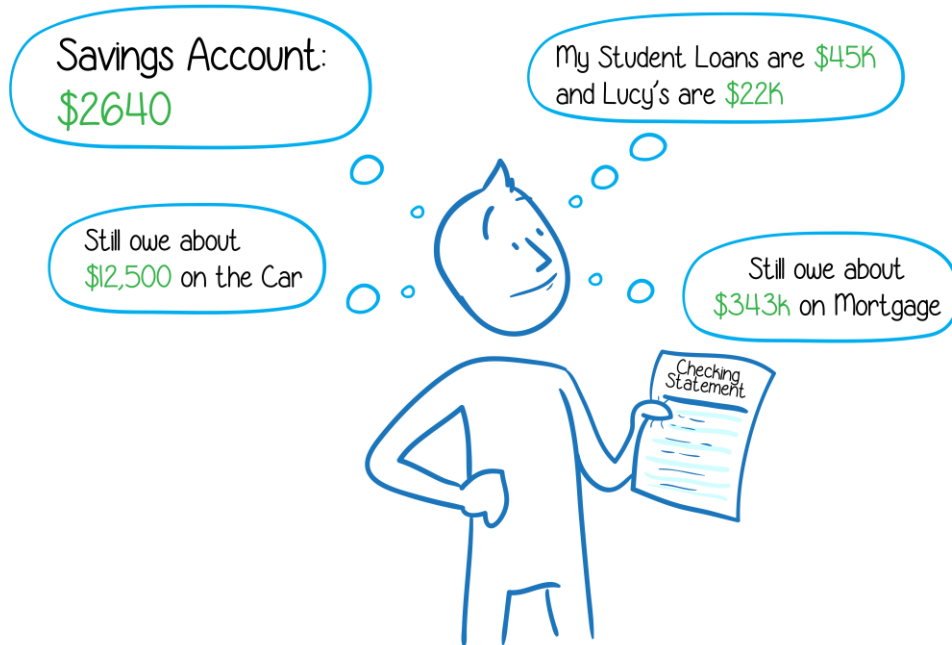


What do you need to get started?



1. your most recent paystub
2. balances on your savings accounts like retirement (IRAs, Rollover IRAs, Roths, 401ks), savings and checking accounts, brokerage accounts (CDs, mutual funds, etc.)
3. balances on your debt accounts like car loans, student loans, mortgages, credit card balances
4. your current home value if you own your home (an online real estate estimator is fine)
5. an idea of what you spend each month on things like utilities, food, entertainment. You can estimate or take a look at your recent spending

If you are self-employed or a freelancer/gig worker, have last year's tax return handy.