SOURCES OF INFORMATION

iScott.net

The following categories and specific information are first identified and considered as relevant or not before given a weighting as to how important to the overall information refining process.

Client Input: (qualitative and specifiable)

A. Current issue/ Problematic emotion or thought / Desired outcome
B. Past Experiences in context
C. Health concerns/ history of immediate family specified and validated
D. Spiritual faith/ religious values in context to A
E. Social values
F. Partner/ Spouse influence
G. Inner conflicts identified and refined for validity
H. Ego
I. Primary motivation
J. Stated emotion

Client Data:

A. Basic Info: Age, gender, profession, income, marital and tax filing status
B. Family members
C. Financial Statements

1. External: Includes every source (bank, brokerage, employee benefits, etc)
2. Internal: Balance Sheet; declaration of assets/ liabilities.

D. Tax returns (1040, 1140, 1065, K-1, etc)
E. Estate Planning documents, Trusts , POA, AHD & beneficiary data
F. Executive / Employee benefits (Summary Plan Description; declarations)
G. Health data immediate family that has been validated and relevant
H. Credit Score
I. Past or existing written financial plans and/ or goals

Standardized Fluid Data:
A. Raw economic, Sector & Regional (BLS, BEA, DALBAR, COMPUSTAT, S&P)
B. Sector & Regional Data (see above)
C. Individual Security Data: Morningstar, ValueLine, IBD, Yahoo Finance

State & Federal Law, Tax Code & Regulatory:
A. Civil code, Securities, employment and financial regulations
B. Federal & State Tax Code: Income, capital gains, gift, estate, property, etc

Research Opinions- Macro Economic Data interpretation & articulation
A. Economic forecasting consensus
B. Sector forecasting
C. Economic Policy analysis

Research Opinions- Micro and Security Specific
WSJ, IBD, CNBC respondents, newsletters, blogs, podcasts, contextual geo-political opinion

Media: All news sources, economic and geo-political commentary,, social media/ YouTube,