Documents Needed

The following documents will be needed to properly study, analyze, and prepare a personal plan for you.
All documents are not necessary but please bring all that you can locate.

Personal Files

- ☐ Latest income tax returns
- ☐ Loan documents
- ☐ Wills / Powers of attorney
- ☐ Trust Agreements / Living trusts
- ☐ Major asset purchase details
- ☐ Other: ______________________________

Employer

- ☐ Payroll or other income statements
- ☐ Employee benefits booklets
- ☐ Retirement savings plans
- ☐ Pension plans
- ☐ Other: ______________________________

Bank or Credit Union

- ☐ Checking account statements
- ☐ Savings/CDs/Money Market account statements
- ☐ Credit Card statements
- ☐ Other: ______________________________

Broker or Mutual Fund Company

- ☐ Latest monthly statements
- ☐ Other: ______________________________

Insurance Company

- ☐ Latest life insurance/annuity account statements
- ☐ Health insurance/hospital & major medical policy information
- ☐ Disability income insurance policy information
- ☐ Property & Casualty policy information
- ☐ Long Term Care policy information
- ☐ Other: ____

Business

- ☐ Buy-Sell Agreements
- ☐ Deferred Compensation Agreements
- ☐ Stock/Option/Bonus Plans
- ☐ Other: ____

Additional Comments:

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All documents will be treated confidentially.