Documents Needed

The following documents will be needed to properly study, analyze, and prepare a personal plan for you. This material will be treated confidentially and returned when the planning process is completed, or earlier if requested.

FROM YOUR:

Personal Files

- ☐ Latest income tax returns
- ☐ Loan documents
- ☐ Wills
- ☐ Trust Agreements
- ☐ Major assets purchase details
- ☐ Social Security Statement
- ☐ Cash Flow Worksheet
- ☐ Expected Inheritances
- ☐ Other ____________________

Employer

- ☐ Payroll or other income statements
- ☐ Employee benefits booklets
- ☐ Retirement savings plans
- ☐ Pension Plans
- ☐ Other ____________________

Bank or Credit Union

- ☐ Checking account statements
- ☐ Savings/CD's/ Money Market account statement
- ☐ Credit Card Statements
- ☐ Other ____________________

Broker or Mutual Fund Company

- ☐ Latest monthly statements
- ☐ Other ____________________

Insurance Company

- ☐ Latest life insurance/annuity account statement
- ☐ 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/Options/Bonus Plans
- ☐ Other ____________________

Additional Comments: ____________________

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Kaplan Financial Group, LLC

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