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.

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 / income statements
- ☐ Employee benefits booklets
- ☐ Retirement savings plans
- ☐ Pension Plans
- ☐ Other ________________

Bank or Credit Union

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

Broker / Mutual Fund

- ☐ 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 ________________

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