



## 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 / 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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