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 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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