Documents Needed

The following documents will be used to prepare a strategy for your financial needs. This material will be treated confidentially and returned.

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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