

# Documents Needed for a Financial Review

- Tax returns and assessments for the client and co-client for the past two years.
- Social Security Statements.
- Pension statements and booklets from the client's and co-client's employers.
- Benefits statements from the client's and co-client's employers.
- Pension statements, investment plans, and benefits plans from former employers.
- Pay stubs for the last two pay periods.
- Life, disability, and long-term care insurance policies.
- Most recent investment statements from banks, trust companies, brokers, and investment companies.
- Budget of personal and living expenses.
- Most recent mortgage and loan statements.
- Most recent will and power of attorney documents.
- Marital agreement(s).
- Severance pay documents.
- Any other relevant documents.