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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.

Employer

- ☐ Payroll or other income statements
- ☐ Employee benefits
    - ☐ Company Benefits Book which shows Benefit Options
    - ☐ Retirement savings plan-401(k), 403(b), 457 options
    - ☐ Pension plans
- ☐ Other____

Investments

- ☐ Retirement
    - ☐ IRA statements (Traditional and Roth)
    - ☐ Qualified Retirement Statements
    - ☐ Annuity Statements
- ☐ Non-Retirement
    - ☐ Brokerage or Mutual Fund Company statements
    - ☐ Bank Statements (Checking/Savings/CD/Money Market)
- ☐ Education
    - ☐ 529 Account Statements/State Sponsored Tuition Plan Statements
    - ☐ UTMA (Uniform Transfers to Minors Act) Statement
- ☐ Other____

Personal

- ☐ Latest Tax Return (Federal and State)
- ☐ Wills and/or Trust Agreements
- ☐ Durable Power of Attorney
- ☐ Major Asset Purchase Details
- ☐ Most Recent Social Security Benefit Statement
- ☐ Other____

Insurance

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- ☐ Life Insurance Policies (Term, Whole Life, Universal or Variable Life)
- ☐ Long Term Care Policy Information
- ☐ Disability Insurance Policies
- ☐ Health Insurance/Hospital & Major Medical Policy Information
- ☐ Homeowner's and Auto Policies
- ☐ Other____

Liabilities

- ☐ Mortgage Loan or Statement
- ☐ Home Equity Loan or Statement
- ☐ Credit Card Statement(s)
- ☐ Student Loan Statement
- ☐ Other ____

Business

- ☐ Buy/Sell Agreements
- ☐ Deferred Compensation Agreements
- ☐ Stock/Option/Bonus Plans
- ☒ Other____

DEPENDANT CHILDREN

Name	Relationship	Date of Birth	Social Security Number	Grade/College Attending

If the children listed above are adult children or beneficiaries, please provide their address, phone number and email:

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Additional Comments