



## Important Financial Documents Checklist

### Retirement Planning Documents

- Recent IRA, 401(k) and other retirement plan statements
- Pension details
- Social Security benefits statement or numbers

### Financial and Investment Documents

- Personal financial statement
- Brokerage account statements
- Annuity statements

### Tax Planning Documents

- Tax return for last year

### Business Planning and Entities

- Types and value of business entities (including C Corp, S Corp & L.L.C.)
- Business succession documents
- Partnership agreements or buy/sell agreements
- Business loan terms

### Asset protection documents

- Life insurance details and statements
- Homeowners and liability or umbrella statements
- Disability and long term care insurance policies

### Estate Planning Documents

- Summary or copy of your will
- Living trusts
- Powers of attorney for property
- Powers of attorney for healthcare
- Living will
- Other estate planning documents (irrevocable trust, family limited partnership, etc.)