



## Document Checklist

Please supply the following documentation below. We will make a copy and return the original back to you.

<b>All investment/retirement account statements with cost basis included</b>	<input type="checkbox"/>
<b>Mortgage and other debt statements</b>	<input type="checkbox"/>
<b>Life and disability insurance statements</b>	<input type="checkbox"/>
<b>Homeowner's, Auto, and liability insurance statements</b>	<input type="checkbox"/>
<b>Most recent tax return</b>	<input type="checkbox"/>
<b>529 Plan statements (or any other custodial account statements)</b>	<input type="checkbox"/>
<b>Two most recent paystubs</b>	<input type="checkbox"/>
<b>Summary of employer benefits package</b>	<input type="checkbox"/>
<b>List of 401(k) fund options (or any other employer-sponsored plan)</b>	<input type="checkbox"/>
<b>Social Security benefits statements &amp; earnings history</b>	<input type="checkbox"/>
<b>Pension plan benefit statement</b>	<input type="checkbox"/>
<b>Employer-sponsored stock option statement</b>	<input type="checkbox"/>
<b>Summary of monthly expenses (if not provided in this questionnaire)</b>	<input type="checkbox"/>
<b>All estate planning documents (wills, trusts, power of attorneys)</b>	<input type="checkbox"/>