



## YOUR DOCUMENT CHECKLIST

Thank you for meeting with us. Here is the additional information we will need to begin your financial plan:

<input type="checkbox"/>	Completed copy of "Your Financial Inventory" worksheet
<input type="checkbox"/>	Statements from pensions or other employer-benefit income that you receive
<input type="checkbox"/>	Social Security statement(s) or check stub(s)
<input type="checkbox"/>	Pay stub(s)
<input type="checkbox"/>	Most recent federal income tax return
<input type="checkbox"/>	Statements from bank accounts (summary pages)
<input type="checkbox"/>	Statements from investment/brokerage accounts
<input type="checkbox"/>	Statements from retirement accounts and employer-sponsored benefit programs (401(k), 403(b), 457, etc.)
<input type="checkbox"/>	Statements from annuities you own
<input type="checkbox"/>	Outstanding balances and monthly payments of loans (mortgage, auto, credit card, business, equity line, etc.)
<input type="checkbox"/>	Estate planning documents (will, power of attorney, trust, etc.)
<input type="checkbox"/>	Life and disability insurance policy
<input type="checkbox"/>	Long-term care insurance policy
<input type="checkbox"/>	Contact information of your CPA and attorneys or other financial professionals (tax and estate) if applicable
<input type="checkbox"/>	Employer compensation benefits (stock options, equity, RSUs, bonus expectations, ESPP, ESOP, etc., if applicable)
<input type="checkbox"/>	Other - Any other documentation you would like us to review or should be aware of. _____

I look forward to seeing you soon.