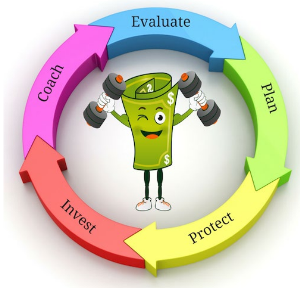

The EPPIC™ Method: 5 Steps to Be More Healthy, Wealthy and Wise™

Below is a checklist of documents needed for a complete analysis of your financial health.

- ◻ Investment Statements (complete statement) – 401K, IRA's, Mutual Funds, Stocks etc.
- ◻ If holding Stock Certificates, the number of Shares of each Stock
- ◻ Bank Statements/CD Statements (interest rates and terms)
- ◻ Annuity Statements (complete statement)
- ◻ Custodial Accounts for minor children (complete statement)
- ◻ Annual Pension Statement
- ◻ Social Security Statements
- ◻ Mortgage Statement
- ◻ Home Equity Statement
- ◻ Loan Statements – Car Loans, Student Loans, Personal Loans etc.
- ◻ Credit Card Statements (if not paying off entire balance every month)
- ◻ Employee Benefits Handbook
- ◻ Life Insurance Annual Statements for Cash Value Policies/Policy for Term Insurance
- ◻ Long-Term Care Policies
- ◻ Disability Insurance Policies
- ◻ Tax Return (previous year)
- ◻ Wills
- ◻ Trust Documents

Please disregard any items from the list that are not applicable to your situation.

Some items may not be easily accessible. We are still able to begin our analysis with some missing items. We will work together to gather any additional information.

In addition, please bring any other documents you feel are important or that you have questions about.

We look forward to working with you!

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