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Data Request Form

Client Name: ______________________________ Date: __________________

____ Cash Flow Worksheet

____ Most Recent Checking, Savings, and Money Market Statements

____ Paycheck Stub(s)

____ Social Security Benefit Report(s) – go to www.ssa.gov

____ Pension Benefits Information

____ Brokerage Account Statements

____ Mutual Fund Statements

____ Employer Plan Investment Options & Matching Formula

____ Employee Benefits Booklet-details on all insurance available to you as well as the insurance that you specifically have and the costs. Your HR department can email or mail you the employee benefits booklet with the premiums along with the specific details on the insurance you hold.

____ State and Federal Tax Return

____ Debt Statements – home, auto, credit card, etc

____ Insurance Policies – outside of work

____ Estate Planning Documents

____ Other ____