WERTH WEALTH PLANNING

IMPORTANT FINANCIAL DOCUMENTS CHECKLIST

When meeting with a financial planner, you will probably be asked to bring the following types of documents. These documents will be used to tailor a financial plan to meet your life goals.

Retirement Planning Documents

___ Recent IRA, 401(k). 403(b), TSA, Keogh statements

___ Employee benefits program

___ Deferred compensation and stock option agreements

___ Pension and profit sharing statements

Tax Planning Documents

___ Tax returns for last year

___ W-2 and recent pay stub

___ Estimated taxes

Financial Documents

___ Savings account statements

___ Mutual fund statements

___ Brokerage account statements

___ Investment documents

___ Loan documents

___ List of stocks held outside of brokerages

___ Partnership agreements

Asset Protection Documents

___ Life insurance policies and statements

___ Medical, homeowners and auto insurance policies and statements

___ Disability, umbrella, and long term care insurance policies

___ Annuity policies and statements

Estate Planning Documents

___ Summary of your will, living will, durable powers of attorney and health care powers

___ Living trusts