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Documents Needed

We will need the following documents and information to complete your financial plan. This material will be treated confidentially and originals will be returned when the planning process is completed or earlier if requested.

Personal Files

- ☐ Last 2 years individual income tax returns
- ☐ Loan documents
- ☐ Wills
- ☐ Trust Agreements
- ☐ Most recent Social Security Statement (all 4 pages)
- ☐ Breakdown of monthly personal expenses

Business

- ☐ Buy-Sell Agreements
- ☐ Deferred Compensation Agreements
- ☐ Stock/Option/Bonus Plans
- ☐ Employee Benefit Plans
- ☐ Last 2 years tax returns
- ☐ Profit/Loss statements for last 2 years

Employer

- ☐ Payroll or other income statements
- ☐ Employee benefits booklets
- ☐ Retirement savings plan statements (i.e., 401(k), 403(b) Profit Sharing, Deferred Comp., etc.)
- ☐ Pension plans

Investments

- ☐ Current statements

Banking

- ☐ Average checking account balance
- ☐ Savings, CD's, Money Market account statements
- ☐ Credit Card statements

Insurance Company

- ☐ Current life insurance/annuity account statements
- ☐ Health insurance/Hospital & Major medical policy information
- ☐ Disability income insurance policy information
- ☐ Property & Casualty policy information
- ☐ Long Term Care (LTC) policy information

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MacLean Financial Group, Inc.