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Financial Planning Document Checklist

- _____ Updated Statement of Net worth
- _____ Gross Income for 2021
- _____ Recent Paycheck Stubs for each client
- _____ Social Security Benefit Statement: socialsecurity.gov/mystatement/
- _____ Recent Investment Account Statements (IRA's, 401(k)'s, etc.)
- _____ Copies of your two (2) most recent Federal Tax Returns
- _____ Recent Statements for Mortgages & Loans
- _____ Employee Benefits Annual statement and Benefits Handbook
- _____ Cash Value Statement for Life Insurance Policies & Annuities
- _____ Copies of Life, Disability & Long-Term Care Insurance Policies
- _____ Wills, Trusts, Power-of-Attorney, Living Wills & Health Care Proxies
- _____ Other: _____
- _____ Other: _____