



Jason Conrad Huntley, CFP®

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## Document List

From your

Personal Files	<input type="checkbox"/> Government Issued ID <input type="checkbox"/> Child/Beneficiary Information (DOB, SS#, Current Address, etc) <input type="checkbox"/> Latest tax returns <input type="checkbox"/> Loan Documents <input type="checkbox"/> Will, Trust <input type="checkbox"/> Major asset purchase details (home etc.) <input type="checkbox"/> <b>Monthly Budget</b> <input type="checkbox"/> Other
Employer	<input type="checkbox"/> Pay Stub <input type="checkbox"/> Benefits booklet <input type="checkbox"/> Retirement plan information <input type="checkbox"/> Other
Bank or Credit Union	<input type="checkbox"/> Checking account statements <input type="checkbox"/> Savings account/CD's /Money market statements <input type="checkbox"/> Credit Card statements <input type="checkbox"/> Other
Brokerage House or	<input type="checkbox"/> Latest monthly statements <input type="checkbox"/> Phone number/Contact person <input type="checkbox"/> Other
Insurance Company	<input type="checkbox"/> Latest life insurance/annuity statement <input type="checkbox"/> Disability income insurance policy information <input type="checkbox"/> Long-Term Care policy information <input type="checkbox"/> Property and Casualty policy information <input type="checkbox"/> Other
Business	<input type="checkbox"/> Buy-Sell Agreements <input type="checkbox"/> Deferred Compensation Agreement <input type="checkbox"/> Stock/Option/Bonus Plans <input type="checkbox"/> Other



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## Expenses

Housing	Mortgage	\$ _____
	Taxes	\$ _____
	Equity Loan	\$ _____
Utilities		\$ _____
Child Care		\$ _____
Transportation		\$ _____
Food and Beverage		\$ _____
Clothing		\$ _____
Furnishings		\$ _____
Personal Care and Cash		\$ _____
Medical/Dental/Rx		\$ _____
Education/Self-improvement		\$ _____
Debt/Installment Payments		\$ _____
Entertainment		\$ _____
Vacations and Holidays		\$ _____
Charitable Contributions		\$ _____
Insurance		\$ _____
Other:		\$ _____
Other:		\$ _____
<b>Total:</b>		<b>\$ _____</b>