1600 S. Main St. Ste.285
Walnut Creek, CA 94596
Phone: (925) 938-2800
Fax: (925) 938-2802

DOCUMENTS NEEDED

The following documents will be needed for the purpose of study and analysis to prepare a personal plan for you. It is understood that this material will be treated **confidentially** and returned when the planning process is completed, or earlier if requested.

Most Recent Payroll Stub

.... Self .... Spouse

Income Tax Returns (for the following years)

.... 20____________ (and 20____________), including all schedules for Self.

.... 20____________ (and 20____________), including all schedules for Spouse.

Personal Employment Benefit Statements

.... Your Employer .... Spouse's Employer

Company Benefit Plan Booklets (Group Benefits & Pension Plans)

.... Your Employer .... Spouse's Employer

Wills

.... Self .... Spouse

Trust Arrangements

.... Self .... Spouse

Business Arrangements

.... Self .... Spouse

Insurance and Annuity Contracts

.... Life Insurance

.... Health Insurance

.... Hospital and Major Medical

.... Disability Insurance

.... Property and Casualty

.... Long-Term Care Insurance

Brokerage (Stocks and Bonds), Mutual Fund and Bank Statements

.... Self .... Spouse

Mortgage

.... Most recent mortgage statement and information