One Tree Hill
Investment Advisors

Documents Needed

The following documents will be needed for the purpose of study and analysis to prepare a personal financial plan for you. We take client confidentiality very seriously. It is understood that this material will be treated in the most professional manner and returned when the planning process is completed.

ITEMS NEEDED

- ☐ Most Recent Payroll
- ☐ Most Recent Investment Statements
  - ☐ Mutual Funds
  - ☐ Stocks
  - ☐ Bonds
  - ☐ CDs
- ☐ Most Recent Income Tax Returns
- ☐ Employee Benefits Booklets
  - ☐ Group Health
  - ☐ Disability
  - ☐ Supplemental Life
  - ☐ 401(k), TSA
  - ☐ Pension Statements
  - ☐ Latest Company Retirement Statements
- ☐ Annuity Contracts
- ☐ Checking and Savings Statements
- ☐ Terms and Balances of Outstanding Liabilities
  - ☐ Mortgages
  - ☐ Credit Cards
  - ☐ Loans
- ☐ Personal Insurance
  - ☐ Insurance Policies and Latest Statements
  - ☐ Life Disability Policies
  - ☐ Property and Casualty Coverages
  - ☐ Long Term Insurance Policies
- ☐ Estate Documents
  - ☐ Wills
  - ☐ POAs
  - ☐ Trust Arrangements
- ☐ Business Arrangements
  - ☐ Buy-Sell
  - ☐ Deferred Compensation
  - ☐ Stock Options/Executive Bonus Plans