FourWord Financial Client Document Checklist

☐ Completed "Client Intake Form"

☐ Completed "Risk Tolerance Questionnaire"

☐ Pay stub(s) dated within the last month (or any other reference to income/revenue)

☐ Current checking, savings, and/or money market statements

☐ Investment/retirement account statement(s) from the previous quarter

☐ Information pertaining to existing insurance coverage(s) (e.g., life insurance, long-term care)

☐ Social Security Estimate(s): www.socialsecurity.gov/estimator

☐ Pension plan statement(s)/estimate(s), if applicable (e.g., TRS)

☐ Information pertaining to any current or anticipated passive income sources (e.g., real estate, inheritance)

☐ Information pertaining to outstanding debt(s) (e.g., mortgage statement, credit card statement(s), personal/educational loan statement(s)

☐ Tax returns (previous 1-3 years)

☐ Declaration Pages for Insurance Policies (Life Insurance, Long-Term Care, Disability, Property and Casualty, etc.)

☐ Other____