

Recommended Documents

Documents listed below are very helpful in establishing your financial position:

- Most recent pay stubs
- Federal and state income tax returns (previous year)
- Pension information
- Most recent Social Security benefit statements (SSA.gov)
- Most recent investment statements (e.g. 401k, IRA, Roth, Individual, etc.)
- Mortgage and other outstanding debt information
- Current wills, trust documents, and other legal documents
- Most recent life, disability, and long-term care insurance statements