

# Documents Needed

TO CREATE YOUR PERSONALIZED FINANCIAL PLAN



## PERSONAL FILES

- Income tax returns for previous two years
- Social Security benefit statement
- Major asset (house, car, etc.) purchase details
- Major asset (house, car, etc.) loan details
- Cash flow worksheet/your own budget sheet
- Financial planning questionnaire

## EMPLOYER

- Two most recent paystubs
- Retirement plan through employer
- Pension plans & pension estimates
- Stock options/vesting schedules

## BANK OR CREDIT UNION

- Checking account statements (or balance)
- Savings/CD/Money Market statements (or balances)
- Credit Card statements (or balance/interest rate & payoff schedule)

## BROKERAGE/MUTUAL FUND COMPANY

- Latest monthly statements

## INSURANCE COMPANY

- Life insurance policy information
- Annuity account information/statements
- Health Insurance policy details (if not covered by employer)
- Disability insurance policy information
- Long-term care policy information

## OTHER

- Student loan documents

ADDITIONAL COMMENTS: