



2605 Camino Tassajara #1629
Danville, CA 94526
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

Securities and Advisory Services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC.