



Financial Planning Documents Needed

From your

Personal Files:

- ☐ Last years tax returns
- ☐ Latest Social Security Statement
- ☐ Loan Documents – Mortgage
- ☐ Wills
- ☐ Trust Agreements
- ☐ Real Estate Cost Basis
- ☐ Current Expense Budget
- ☐ Other: _____
- ☐ Funeral/Cemetery Plots- Preplanning Information & Plot Certificate
- ☐ Copy of Birth Certificate
- ☐ Copy of Military DD214
- ☐ Copy of Marriage or Divorce Certificates Paper
- ☐ Stock Certificate/Savings Bonds

Employer:

- ☐ Payroll or other income statements
- ☐ Employee benefits booklets
- ☐ Retirement savings plans
- ☐ Pension Plans
- ☐ Health Insurance Plans
- ☐ Other: _____

Bank or credit Union:

- ☐ Checking account statements
- ☐ Savings/CDs/Money Market account statements
- ☐ Credit Card statements

Broker or Mutual Fund Company:

- ☐ Latest Monthly Investment account statements
- ☐ Latest monthly Retirement account statements
- ☐ Other: _____

Insurance Company:

- ☐ Latest Life Insurance/Annuity Statements
- ☐ All beneficiary Information
- ☐ Health Insurance/hospital & major medical information
- ☐ Disability income insurance policy information
- ☐ Property & Casualty policy information
- ☐ Long-Term Care policy information
- ☐ Auto/Homeowners information

Business:

- ☐ Deferred compensation Agreements
- ☐ Stock/Options/Bonus Plan
- ☐ Corporation or Business Entities
- ☐ Other: _____

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