



Document List 2025

Digital (pdf) format is preferred. We will provide a secure upload link.

Investments - Recent statements for accounts

<input type="checkbox"/> Bank Accounts	<input type="checkbox"/> Savings Bonds - copies
<input type="checkbox"/> Brokerage and Mutual Fund Accounts	<input type="checkbox"/> Private Equity & Loans
<input type="checkbox"/> Stock Dividend Reinvestment Plans	<input type="checkbox"/> IRA, Roth IRA, SEP IRA, Simple
<input type="checkbox"/> Annuities	<input type="checkbox"/> Pension, Profit Sharing, 403(b), 401(k), 457
<input type="checkbox"/> Stocks held in direct registration	<input type="checkbox"/> Annual Social Security Statement
<input type="checkbox"/> Stock / Bond Certificates - copies	<input type="checkbox"/> Digital Assets – Cryptocurrency, etc.

Insurance – Policies and recent statements

<input type="checkbox"/> Life Insurance	<input type="checkbox"/> Disability Insurance
<input type="checkbox"/> Health Insurance	<input type="checkbox"/> Long Term Care Insurance
<input type="checkbox"/> Health Savings Account (HSA)	<input type="checkbox"/> Home/Apartment Insurance
<input type="checkbox"/> Umbrella Liability Insurance	<input type="checkbox"/>

Employee Benefits – Information on the following

<input type="checkbox"/> Retirement plan contributions	<input type="checkbox"/> Employee Stock Purchase Plan (ESPP)
<input type="checkbox"/> Employer matching retirement contributions	<input type="checkbox"/> Flexible Spending Account
<input type="checkbox"/> Stock Options	<input type="checkbox"/> Other employee benefits

Income (current)

<input type="checkbox"/> Recent pay stub	<input type="checkbox"/> Pension Income
<input type="checkbox"/> Social Security Income	<input type="checkbox"/> Other Income

Taxes

<input type="checkbox"/> Recent tax return
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Liabilities – Recent statements

<input type="checkbox"/> Home Mortgages	<input type="checkbox"/> School Loans
<input type="checkbox"/> Home Equity Line of Credit	<input type="checkbox"/> Personal Loans
<input type="checkbox"/> Automobile Loans	<input type="checkbox"/> Credit Cards

Estate Planning & Life Documents – Copies of documents

<input type="checkbox"/> Will	<input type="checkbox"/> Health Care Proxy & HIPAA Release
<input type="checkbox"/> Trusts	<input type="checkbox"/> Living Will
<input type="checkbox"/> Legacy Letter / Ethical Will	<input type="checkbox"/> Anatomical Gift Instrument
<input type="checkbox"/> Durable Power of Attorney	<input type="checkbox"/> Declaration of Homestead
<input type="checkbox"/> Prenuptial / Postnuptial Agreements	

Other Documents

<input type="checkbox"/> Other financial statements and legal documents that are relevant to your Life
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