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Document List

To develop a comprehensive financial plan please provide as many of the documents from the list below as possible. If you have any other documents or information that you feel are relative please provide those as well.

- Last Will and Testament
 - Financial Power of Attorney
 - Advance Directive for Healthcare
 - Tax Returns from the past two years
 - Balance Sheet of Assets/Liabilities (if one is available)
 - Income Sources (salary*, bonus, other, etc.)
 - Personal/Family Budget Worksheet
- * Provide recent payroll stubs.

Most Recent Account Statements:

- Bank/Credit Union Accounts
 - Mutual Funds/Brokerage Accounts
 - IRA/Retirement Plan Accounts
 - Loan Closing Statement and/or Mortgage Agreement For:
 - Home/Rental Property
 - Auto(s)
 - Home Equity Line of Credit/Second Mortgage
- Other

Employee Benefit Statements:

- Medical/Dental Coverage
- Life/Disability Insurance Coverage
- 401(k)/Pension Account
- Deferred Compensation
- Stock Option Summary
- Other

Summary Pages of Personal Insurance Policies:

- Life Insurance/Disability
- Automobile/Homeowners
- Homeowners
- Other

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