DOCUMENT and INFORMATION CHECKLIST

1. BANK STATEMENTS (ASSETS AND LIABILITIES)

☐ Value of savings and checking accounts

☐ IRAs/Brokerage accounts not with our practice

☐ Loan Information (cars, boat, education and/ or mortgage) such as balance, interest rate, and minimum payments required

2. OTHER ASSETS AND EMPLOYER INVESTMENT DOCUMENTS

☐ 401k statements

☐ Profit sharing statements

☐ Deferred compensation statements

☐ Stock options statements

☐ Life Insurance information and/or Long Term Care Insurance (LTC) - policy details such as death benefit, coverage amount, and your monthly or annual premium costs (if not already in our plan)

3. UPCOMING LIFE EVENTS TO CONSIDER

☐ Career Change
☐ Debt Management
☐ Domestic Partner Planning
☐ Education Funding
☐ Serious Health/ Disability Issue
☐ Marriage / Divorce
☐ Business Sale/Purchase
☐ Passing of a Loved One
☐ Retirement Transition
☐ Aging Parent

4. MISCELLANEOUS

☐ Current wage/business income
☐ Significant other current incomes
☐ Current pension/Social Security incomes (if you are retired)
☐ Your most recent tax return
☐ Updated Social Security Information (can be found at ssa.gov/myaccount)

***Other items we may need to consider in the next twelve months such as a home purchase, car, vacation, etc.**