



## Document and Information Checklist

### Bank Statements (Assets and Liabilities)

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- Value of savings and checking accounts
- IRAs/Brokerage accounts not with our practice
- Loan information (cars, boats, education and/ or mortgage) such as balance, interest rate, and minimum payments required

### Other Assets and Employer Investment Documents

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- 401k statements
- Profit sharing 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)

### Upcoming Life Events to Consider

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| <input type="checkbox"/> Career Change                   | <input type="checkbox"/> Marriage/Divorce       |
| <input type="checkbox"/> Debt Management                 | <input type="checkbox"/> Business Sale/Purchase |
| <input type="checkbox"/> Domestic Partner Planning       | <input type="checkbox"/> Passing of a Loved One |
| <input type="checkbox"/> Education Funding               | <input type="checkbox"/> Retirement Transition  |
| <input type="checkbox"/> Serious Health/Disability Issue | <input type="checkbox"/> Aging Parent           |

### Miscellaneous

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- 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](https://ssa.gov/myaccount))

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

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