Financial Planning Document Checklist

To provide you with the most accurate financial plan, please provide copies of the following documents:

- ☐ Completed “Financial Planning Questionnaire”(PDF or Online Version).
- ☐ Two most recent tax returns.
- ☐ Most recent investment/retirement account statements including balances and investment allocation.
- ☐ Recent mortgage statement which includes balance and interest rate.
- ☐ Recent Credit card, student loan, and other loan statements.
- ☐ Current life insurance policies.
- ☐ Recent statement/illustration for cash value life insurance policies.
- ☐ Long term care policies.
- ☐ Disability, Auto, and Homeowners insurance policies.
- ☐ Summary of employer benefits (insurance, pension, 401(k) match etc.).
- ☐ Current Social Security statements(find online at www.ssa.gov/myaccount).
- ☐ Details for wills or trusts.