YOUR DOCUMENT CHECKLIST

Thank you for meeting with us. Here is the additional information we will need to begin your financial plan:

☐	Completed copy of "Your Financial Inventory" worksheet
☐	Statements from pensions or other employer-benefit income that you receive
☐	Social Security statement(s) or check stub(s)
☐	Pay stub(s)
☐	Most recent federal income tax return
☐	Statements from bank accounts (summary pages)
☐	Statements from investment/brokerage accounts
☐	Statements from retirement accounts and employer-sponsored benefit programs (401(k), 403(b), 457, etc.)
☐	Statements from annuities you own
☐	Outstanding balances and monthly payments of loans (mortgage, auto, credit card, business, equity line, etc.)
☐	Estate planning documents (will, power of attorney, trust, etc.)
☐	Life and disability insurance policy
☐	Long-term care insurance policy
☐	Contact information of your CPA and attorneys or other financial professionals (tax and estate) if applicable
☐	Employer compensation benefits (stock options, equity, RSUs, bonus expectations, ESPP, ESOP, etc., if applicable)
☐	Other - Any other documentation you would like us to review or should be aware of.

I look forward to seeing you soon.