

To assist in the financial planning process, sometimes it is easier to supply a copy of your financial documents. Here is a list of documents that may or may not apply to your specific situation. All documents will be treated with confidentiality, and will be destroyed after use.

- Most Recent Payroll Stub**
- Income Tax Returns-Previous year**
- Current Financial Situation**
 - Current Budget
 - Monthly Expenses
 - Mortgage Statement
 - Social Security Statement
 - Prior financial plans
- Wills/Trusts**
- Insurance/Annuity Contracts, Statements, and In-force Illustrations**
 - Life
 - Health
 - Disability
 - Group Insurance
 - Annuities
- Loan Documents**
- Savings/ Investment Statements**
 - Pension Plan/Profit Sharing
 - SEP
 - 401(k)
 - Annuity/Employee Deferred Compensation
 - IRA/Roth IRA
 - Savings
 - Mutual Fund Accounts & Brokerage Accounts
 - Checking account average balance
 - Savings Account
- Stock Options**
 - Statements
 - Vesting Schedule(s)



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May Lose Value