

The following documents will be needed to properly study, analyze, and prepare a personal plan for you. This material will be treated confidentially and returned when the planning process is completed, or earlier if requested.

From your

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| Personal Files | <input type="checkbox"/> Latest income tax returns <input type="checkbox"/> Loan documents <input type="checkbox"/> Wills <input type="checkbox"/> Trust Agreements <input type="checkbox"/> Major asset purchase details <input type="checkbox"/> Other _____ |
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| Employer | <input type="checkbox"/> Payroll or other income statements <input type="checkbox"/> Employee benefits booklets <input type="checkbox"/> Retirement savings plans <input type="checkbox"/> Pension plans <input type="checkbox"/> Other _____ |
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| Bank or Credit Union | <input type="checkbox"/> Checking account statements <input type="checkbox"/> Savings / CDs / Money Market account statements <input type="checkbox"/> Credit Card statements <input type="checkbox"/> Other _____ |
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| Broker or Mutual Fund Company | <input type="checkbox"/> Latest monthly statements <input type="checkbox"/> Other _____ |
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| Insurance Company | <input type="checkbox"/> Latest life insurance annuity account statements <input type="checkbox"/> Health insurance / hospital & major medical policy information <input type="checkbox"/> Disability income insurance policy information <input type="checkbox"/> Property & Casualty policy information <input type="checkbox"/> Long-Term Care policy information <input type="checkbox"/> Other _____ |
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| Business | <input type="checkbox"/> Buy-Sell Agreements <input type="checkbox"/> Deferred Compensation Agreements <input type="checkbox"/> Stock / Option / Bonus Plans <input type="checkbox"/> Other _____ |
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Additional Comments:
