STROUSE WEALTH ADVISORS® | *Investing in your life.®*

Documents Checklist

The following documents will be needed in order 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.

Prepared by Adam B. Strouse, CFP®

From Your…	✓	
Personal Files	☐	Latest Income Tax Returns
	☐	Loan Documents
	☐	Wills
	☐	Trust Agreements
	☐	Major Asset Purchase Details
	☐	Other ________________________
Employer	☐	Payroll or Other Income Statements
	☐	Employee Benefits Booklets
	☐	Retirement Savings Plans
	☐	Pension Plans
	☐	Other ________________________
Bank or Credit Union	☐	Checking Account Statements
	☐	Savings/CD's/Money Market Account Statements
	☐	Credit Card Statements
	☐	Other ________________________
Broker or Mutual Fund Company	☐	Latest Monthly Statements
	☐	Other ________________________
Insurance Company	☐	Latest Life Insurance/Annuity Account Statements
	☐	Health Insurance/Hospital & Major Medical Policy Information
	☐	Disability Income Insurance Policy Information
	☐	Other ________________________
Business	☐	Buy-Sell Agreements
	☐	Deferred Compensation Agreements
	☐	Stock/Option/Bonus Plans
	☐	Other ________________________

Additional Comments: ____

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