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

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 / CDs / 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 ☐ Property & Casualty policy information ☐ Long-Term Care policy information ☐ Other ______
Business	☐ Buy-Sell Agreements ☐ Deferred Compensation Agreements ☐ Stock / Option / Bonus Plans ☐ Other ______

Additional Comments