Personal Documents

A review of your financial documents is a critical part of understanding your present financial situation. This review will enable us to fully evaluate the appropriateness of your current plan, identify weaknesses, and make relevant observations and recommendations.

- ❑ Personal Financial Statement
- ❑ Wills
- ❑ Trusts
- ❑ Marital Property Agreements
- ❑ Power of Attorney
- ❑ Health Care Power of Attorney
- ❑ Life Insurance Policies & Most Recent Policy Statement
- ❑ Disability Insurance Policies
- ❑ Income Tax Returns for Three Years
- ❑ Gift Tax Returns
- ❑ Most Recent Profit Sharing, 401(k), or Pension Plan Statement
- ❑ Investment Statements (Brokerage, Mutual Funds, IRAs, etc.)
- ❑ Annuity Contracts and Most Recent Account Statements
- ❑ Prenuptial Agreements
- ❑ Dissolution of Marriage
- ❑ Property Agreements
- ❑ Loan Agreements
- ❑ Other: ____

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