



DOCUMENT CHECKLIST

○ PAYSTUB

○ EMPLOYEE BENEFIT SUMMARY

- Life Insurance Options
- Employer Sponsored Disability Insurance
- HSA/Flex Spending Account Availability
- Retirement Savings Account Options
- Matching & Vesting Schedule

○ INVESTMENT ACCOUNT STATEMENTS

- Brokerage
- Annuity
- Mutual Funds
- CD's
- Stock Holdings

○ EDUCATION SAVINGS

- 529's
- Coverdell
- UGMA/UTMA

○ RETIREMENT ACCOUNT STATEMENTS

- IRA
- Pension
- Roth IRA
- Deferred Comp
- 403b
- SEP/SIMPLE
- Profit Sharing/401k

○ EMPLOYEE EQUITY PROGRAMS

- Non-qualified Stock Options
- Restricted Stock
- Incentive Stock Options
- Employee Stock Purchase Plan

○ SOCIAL SECURITY BENEFIT ESTIMATE

○ LOAN STATEMENTS

- Mortgage
- Student Loans
- Personal Loans
- Auto Loans
- Home Equity Line of Credit
- Credit Card Statements

○ CURRENT & PRIOR YEAR TAX RETURNS

○ ESTATE PLANNING DOCUMENTS

- Will Year _____
- Power of Attorney Year _____
- Trust Year _____
- Health Care Directive Year _____

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