



Planning ▪ Direction ▪ Knowledge

**Financial Documents Checklist**

<b>Subject</b>	<b>Source</b>
Confidential Profile	Completed Confidential Profile
Income	Last year's tax return
Savings	Most recent statements from bank accounts, money market funds, certificates of deposit
Borrowings and Debt	A list of debts such as for home mortgage, business loans, student loans, auto loans and credit card balances (if not paid in full monthly)
Retirement Accounts	Most recent plan statements, such as for a company plan, 401(k), Simplified Employee Pension (SEP), Individual Retirement Account (IRA), Roth IRA, Simple IRA, Tax Sheltered Annuity (TSA), or other annuities
Investment Accounts	Most recent investment statements
Insurance	List of insurance policies such as life, disability, health long-term care, or any other insurance
Other	Any other financial information you believe would be of value

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