New Client Suggested Checklist:

- Will/POA (Financial and Healthcare)/Trust documents
- Last year's tax return
- Last 2 most recent pay stubs
- Social Security Benefit Statement
- 401k/403b/Pension/ESOP Information
- Employee benefit report
- Investment/Stock/Bank statements
- Business/Land contract information
- Loan Agreements
- Credit Card Debt
- Life insurance policies/statements
- Beneficiary Information (Name(s)/DOB/SS#)
- Anything else you would like to discuss