Documents Needed for the Next Meeting

The following documents will be needed for study and analysis as we work together to create a financial strategy for you. It is understood that this material will be treated confidentially and returned when the plan is completed, or earlier if requested.

	Most Recent Payroll Stubs		**Insurance Policies and/or Statements**
	Client		Life
	Co-client		Medical
			Disability
	Income Tax Returns		Long-term Care
	Client		Auto and Home
	Co-client		Liability
	Business		Group Insurance
	Investments and Retirement Statements and/or plan descriptions		**Employee Benefit Statements/ Booklets**
	Pension/Profit Sharing		Client
	SEP/SIMPLE		Co-client
	401(k)/TSA/ PEDC		
	IRA/ Roth		**Business Documents**
	529		Buy-Sell Agreements
	Securities Accounts		Deferred Compensation Agreements
	Savings and investments		Split Dollar Agreements
	Annuities		Wage Continuation Agreements
			Employee/Consulting
	Wills and Trusts		Group Benefit Programs
	Client		Other Employer Paid Benefits
	Co-client		
			Cash Flow Worksheet

Other: