

INCOME CHECKLIST

- Recent Paycheck Stub
- Income Tax Returns (2 years)
- Recent Social Security Statement (<http://www.ssa.gov>)

ASSET CHECKLIST

- Most Recent Investment Account Statements
- Investment Documents

ESTATE PLANNING CHECKLIST

- Wills
- Trust Documents

INSURANCE CHECKLIST

- Auto Insurance Declaration Pages
- Home Owners Declaration Pages
- Personal Liability (Umbrella Policy)
- Life Insurance Policies
- Disability Insurance Policies
- Long Term Care Insurance
- Medical Insurance

DEBT CHECKLIST

- Real Estate
- Consumer Debt (Car, Credit Card)

OTHER

- _____
- _____

Top Three Topics For Discussion

1.

2.

3.

Notes

