DOCUMENTS NEEDED FOR FINANCIAL PLANNING

1. Investment Statements/ Info.
    - Mutual Funds
    - Individual Equities (stocks)
    - Bonds
    - Savings Accounts
    - CD's
    - Checking Accounts
    - Money Market Funds
    - IRA's
    - Corporate Savings and Thrift Programs
    - Vested Pension Program Amounts

2. Company Benefits Booklets/Employee Benefit Program Descriptions
    - Group Health and Dental Insurance
    - Group/Individual disability Income Insurance
    - Group Life Insurance
    - Pension and Profit Sharing Plans

3. Insurance and Annuity Contracts
    - Life Insurance
    - Qualified/Nonqualified Annuities
    - Disability Income
    - Long Term Care

4. Estate Planning
    - Wills
    - Living Wills and Trust Directives
    - Revocable/Irrevocable Trusts
    - General/Durable Power of Attorney
    - Financial/Health Care Power of Attorney
    - Qualified Personal Residence Trust
    - Family Limited Partnership

5. Most Recent Paycheck Stubs

6. Most Recently Filed Income Tax Return

7. Completed Living Expenses Worksheet

8. Social Security Benefit Determination Statements