

Confidential Documents to Gather

	Copy of Will, Trust, and any Power of Attorneys
	Copy of Current Coverage ___ Life Insurance – include most recent statement ___ Health Insurance ___ Long Term Care ___ Disability Income ___ Group Benefits ___ Home, Auto and Umbrella
	Pay-Check Stubs
	Social Security Statements (or monthly amount received)
	Pension Information
	Any budget you have
	Investment Statements – include most recent copy of statements ___ C.D.'s ___ Money Markets ___ Stocks & Bonds – List of share amounts and cost basis ___ Annuities, 401(k)s, Mutual Funds, IRA's, Roth IRA's
	Bank Statements (account balances)
	Copy of Most Recent Tax Return
	Other Assets – List values of Home Land, Real Estate, Farm Equipment etc.
	Liabilities Figures (if possible, need amount and mo payment amt) ___ Home Loans, Credit Cards, Auto Loans, Home Equity, etc.



350 Oak Tree Lane, Suite 150, Dakota Dunes, SD 57049
 Phone (605) 217-3555 / Toll Free (866) 800-2186 / Fax (605) 217-3535 / Web sterkfinancialservices.com

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