**List of Documents to collect:**

\_\_\_ Most recent statements from bank accounts, mutual funds, retirements accounts, brokerage

statements, CD’s etc.

\_\_\_ Copy of most recent Federal and State tax returns, including all pages

\_\_\_ A list of privately held stocks, including date of acquisition, number of shares and cost basis if known

\_\_\_ A list of privately held bonds

\_\_\_Copy of most recent paystub and W-2 forms, monthly pension statements etc.

\_\_\_ Documentation relevant to other sources of income, such as notes receivable, mortgages held, annuities, pensions etc

\_\_\_ Copies of current wills, trust documents, divorce decrees/separation agreements

\_\_\_ List of current liabilities including balances, interest rates and payments. Most recent statements for mortgages are helpful.

\_\_\_ Employee benefit information, including pension info, 401(k) options and insurance coverages

\_\_\_ Copy of Insurance policies, including property, auto and disability

\_\_\_ Social Security Benefits statements ([www.socialsecurity.gov](http://www.socialsecurity.gov))

\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_