



Financial, Retirement & Estate Planning

Strategic Guidance For Life's Journey

List Of Confidential Documents

This List Of Confidential Documents will help you know exactly what information is necessary to pull together as you begin to make a plan. Gather the relevant data you need in order to make a strong retirement decision.

- _____ Copy of Will
- _____ Any budget you have
- _____ Copy of Most Recent Tax Return
- _____ Copy of Current Coverage
 - _____ Life Insurance – include most recent statement
 - _____ Health Insurance
 - _____ Disability Income
 - _____ Long-Term Care
 - _____ Group Benefits
 - _____ Home, Auto and Umbrella
- _____ Financial Statements
- _____ Social Security Statements (or monthly amount received)
- _____ Bank Statements (account balances)
- _____ 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, IRAs, Roth IRAs
- _____ Pay-Check Stubs
- _____ Liabilities Figures
 - _____ Home Loans, Credit Cards, Auto Loans, Home Equity, etc.
- _____ Other – List values of Land, Real Estate, Farm Equipment etc.

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