



Document Checklist

Personal Financial Statement

Bank Statements

- *Checking*
- *Savings*
- *CDs*

Brokerage Account Statements

- *Stocks and Bonds*
- *Mutual Funds*

Retirement Plan Statements

- *401(k)*
- *IRA*
- *SEP-IRA*
- *403(b)*
- *Updated Social Security Statement (most recent)*

Legal Documents

- *Wills*
- *Trust Documents*
- *Settlement Agreements*
- *Business Agreements*
- *Divorce Judgments*
- *Powers of Attorney*
- *Deeds*

Insurance Policies

- *Life*
- *Disability*
- *Health*
- *Homeowner*
- *Umbrella/Excess Liability*

Employee Benefit Statements

- *Projected Pension Benefit*
- *Group Term Life Insurance Coverage*
- *Group Disability Insurance Coverage*

Pay Stubs (last two)

- *Self*
- *Spouse*

Federal and State Income Tax Returns (last two years)

- *Personal*
- *Business*
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