



## **FINANCIAL PLANNING: IMPORTANT DOCUMENTS**

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The following documents may be used for the purpose of preparing a financial plan. Please bring a copy of the applicable documents to your initial consultation. Thank you.

### Personal Financial Statements

- Household Budget (template is available upon request)
- Household Statement of Financial Position (template is available upon request)
- Most recent federal and state tax returns (including all attached schedules and W-2s)

### Estate Planning

- Wills / Living Wills / Powers of Attorney
- Trusts

### Business Arrangements

- Buy / Sell Agreements
- Deferred Compensation
- Stock Option / Bonus Plan

### Assets Documents

- Bank Statements
- Retirement Account Statements
- Annuity contracts / policies
- Education Account Statements
- Appraisals (real estate, artwork, collectibles, etc.)

### Retirement Documents

- Social Security Benefits Statement
- Pension Plan Benefits
- Employer sponsored retirement plan accounts
- Health Care Benefits in Retirement

### Liability Documents

- Mortgage loan statement (original loan value, interest rate, term, P&I payment)
- Loans documents and statements/bills (auto, credit card, education, etc.)

### Other Documents

- Insurance Policies Benefits: (health, dental, auto, disability, home, life, long-term care, etc.)
- Most recent paycheck stubs

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