Required Documents List

Please bring all the following documents to your next planning meeting. Understand that delays in getting this documentation to us may delay the preparation of your financial plan and our investment recommendations.

Documents Needed:

- ☐ All Account Statements
- ☐ Wills, Durable Powers of Attorney, Health Care Powers of Attorney, etc.

  All Insurance Policies:
  - ☐ Life
  - ☐ Annuity Contracts
  - ☐ Disability – through employer and private
  - ☐ Long Term Care
  - ☐ Health – through employer and private
  - ☐ Homeowners
  - ☐ Auto
  - ☐ Umbrella Liability
  - ☐ Others
- ☐ Personal Financial Questionnaire
- ☐ Risk Tolerance Questionnaire
- ☐ Employee Benefits Booklet(s)
- ☐ Social Security Projections
- ☐ Recent Check Stub(s)
- ☐ Most Recent Tax Return