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Suggested Documents Needed for Comprehensive Financial Planning Meeting

_______ Tax returns for the past two years

_______ Current liability statements (loans, mortgages, credit card balances, and debts)

_______ Current investment account statements

_______ Current bank statements (checking, savings, CDs)

_______ Two recent employer payroll stubs

_______ Employer benefit information/statements

- Health insurance
- Retirement plans
- Pensions
- Other benefits

_______ Deferred compensation agreements - participating or eligible

_______ Documentation of pension benefits due from your former employer

_______ Recent social security statement

_______ Copy of current wills, powers of attorney, health care proxies, and living wills

_______ Copy of trusts (marital, ILITs, living, etc.)

_______ Copy of prenuptial agreement

_______ Life, health, and disability insurance policies, including annuities

_______ Estimated value of home

_______ Value of other real estate

_______ Current household budget