# Financial Planning Documents Needed

From your

---

Personal Files:

- Last years tax returns
- Loan Documents – Mortgage
- Wills
- Trust Agreements
- Real Estate Cost Basis
- Current Expense Budget
- Other: ____________________

---

Employer:

- Payroll or other income statements
- Employee benefits booklets
- Retirement savings plans
- Pension Plans
- Health Insurance Plans
- Other: ____________________

---

Bank or credit Union:

- Checking account statements
- Savings/CDs/Money Market account statements
- Credit Card statements

---

Broker or Mutual Fund Company:

- Latest Monthly Investment account statements
- Latest monthly Retirement account statements
- Other: ____________________

---

Insurance Company:

- Latest Life Insurance/Annuity Statements
- All beneficiary Information
- Health Insurance/hospital & major medical information
- Disability income insurance policy information
- Property & Casualty policy information
- Long-Term Care policy information
- Auto/Homeowners information

---

Business:

- Deferred compensation Agreements
- Stock/Options/Bonus Plan
- Other: ____________________