

DOCUMENTS NEEDED FOR OUR NEXT MEETING

Some or all of the following documents provide information that can be important as we work together to create a strategy. This material will be treated confidentially.

MOST RECENT PAYROLL STUB

- Self
- Spouse

INCOME TAX RETURNS – PREVIOUS TWO YEARS

- Self
- Spouse (if filing separately)
- Business

CURRENT FINANCIAL STATEMENTS

- Personal Net Worth
- Monthly Expenses
- Business Balance Sheet

FINANCIAL PLAN ANALYSIS

- Existing Plan
- Existing Needs Analysis

WILLS/TRUSTS

- Self
- Spouse

DIVORCE DECREE/SEPARATION AGREEMENTS/NUPTIAL AGREEMENTS

- Self
- Spouse

INSURANCE/ANNUITY CONTRACTS, STATEMENTS, AND IN-FORCE ILLUSTRATIONS

- Life
- Health
- Disability
- Group Insurance
- Annuities

LOAN AGREEMENTS AND AMORTIZATION SCHEDULES

- Mortgage
- Other

SAVINGS AND RETIREMENT STATEMENTS

- Pension Plan/Profit-Sharing
- Keogh/SEP
- 401(k) Tax-Sheltered Annuity/Employee-Deferred Compensation
- IRA/Roth IRA
- Savings
- Mutual Fund Accounts & Brokerage Account

COMPANY BENEFIT STATEMENTS/BOOKLETS

- Self
- Spouse

STOCK OPTIONS

- Statements
- Vesting Schedule(s)

BUSINESS DOCUMENTS

- Buy/Sell Agreement
- Deferred Compensation
- Wage Continuation
- Employment Agreement
- Group Benefit Programs
- Other Employee Paid Benefits