



## Document Collection Checklist

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Please bring any documents you feel are relevant to your current needs and situation. While it's recommended to bring as much as possible, **we'll work with what you're able or willing to provide.**

- Statements of brokerage, annuity, and retirement plan account
- Statements of CD, money market, and savings
- List of debt payments (Credit Cards, Loans, Mortgages, Cars)
- Mortgage statements and list of other real estate investment
- Most Recent Paystub

### **OPTIONAL**

- Company benefit plan details ( Stock options, pensions payout information)
- Social security benefit statements
- All applicable insurance policies (life, disability, health & long-term care)
- Will and trust documents
- Income tax returns (most recent)

### **FOR BUSINESS OWNERS**

- Shareholder agreements
- Employee stock options
- Previous year Profit & Loss
- Buy/sell agreements

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