HELPFUL DOCUMENTS FOR FINANCIAL PLANNING

The following documents will be needed for the purpose of study and analysis in an effort to prepare a personal financial plan for you. It is understood that this material will be treated confidentially and returned as soon as the planning process is completed, or at an earlier time if requested.

Most Recent Payroll Stub

[ ] Self
[ ] Spouse

Income Tax Returns for the Past Two Years

[ ] Self
[ ] Spouse

Personal Employment Benefit Statements (i.e. pension statements or 401(k) statements) and Company Plan Booklets

[ ] Self
[ ] Spouse

Wills and Trust Agreements

[ ] Self
[ ] Spouse

Business Arrangements

[ ] Buy / Sell Agreements
[ ] Deferred Compensation Information
[ ] Stock Option / Bonus Plan Information

Investment and Saving Accounts

[ ] Mutual Fund Statements (since inception)
[ ] Brokerage Statements (since inception)
[ ] Listing of Individual Securities Owned (# of shares and purchase price)
[ ] Listing of Individual Savings Accounts
[ ] Annuity Contracts

Insurance Contracts

[ ] Life Insurance
[ ] Disability Insurance
[ ] Health Insurance
[ ] Hospital & Major Medical
[ ] Long Term Care Insurance
[ ] Automobile Insurance
[ ] Property / Casualty / Liability Insurance

Advisors (name and address)

[ ] Accountant
[ ] Attorney
[ ] Stock Broker
[ ] Insurance Agent