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PLANNING DOCUMENTS CHECKLIST

Please bring the following documents with you to your planning meeting. We will review and discuss these items with you to better understand your personal financial situation.

PERSONAL DOCUMENTS

- [x] Social Security statement(s)
- [x] Mortgage and loan information
  - Amount Owed / Rate / Monthly Payment
- [x] Most recent tax return
- [ ] Other: Click here to enter text. ________________________

EMPLOYER SPONSORED RETIREMENT PLAN

- [x] Retirement Savings Plan(s) Statement(s) (401k, 403b, Deferred Comp., etc.)
- [ ] Other: Click here to enter text. ________________________

INVESTMENTS / CD'S

- [x] Current investment statement(s)
- [x] Maturity dates and current yield of Certificates of Deposit
- [ ] Other: Click here to enter text. ________________________

INSURANCE

- [x] Home and Auto Insurance declarations page (or Policy Renewal document)
- [x] Umbrella Policy déclarations page (or Policy Renewal document)
- [x] Life Insurance statements
- [x] Annuity account statements
- [x] Disability income insurance policy information
- [x] Long-term care policy information
- [ ] Other: Click here to enter text. ________________________

BUSINESS

- [ ] Company-sponsored plan document
- [ ] Deferred Compensation / Stock/Option / Bonus plan agreements
- [ ] Buy-sell agreement
- [ ] Other: Click here to enter text. ________________________

ESTATE / OTHER

- [x] Will documents
- [x] Trust Agreements
- [x] Power of Attorney / Medical Directives
- [ ] Other: Click here to enter text. ________________________