IMPORTANT FINANCIAL DOCUMENTS CHECKLIST

BluePrint FINANCIAL PLANNING
MORE THAN JUST INVESTING
RAYMOND JAMES

When you meet with us, please try to bring along the following documents that apply to you.

Retirement Planning Documents

- ☐ Recent IRA. 40 1 (k), 403(b). TSA, Keogh statements
- ☐ Employee benefits program
- ☐ Deferred compensation and stock option agreements
- ☐ Pension and profit sharing statements
- ☐ Social Security Statements

Tax Planning Documents

- ☐ Tax returns for last year
- ☐ W-2 and a recent pay stub
- ☐ Estimated taxes

Financial Documents

- ☐ Savings account statements
- ☐ Mutual fund statements
- ☐ Brokerage account statements *(Not statements for RJFS accounts housed by us)*
- ☐ Investment documents
- ☐ Loan documents
- ☐ List of stocks held outside of brokerages
- ☐ Partnership agreements

Asset Protection Documents

- ☐ Life insurance policies and statements
- ☐ Disability, umbrella. and long term care insurance policies
- ☐ Annuity policies and statements

Estate Planning Documents

- ☐ Summary of your will, living will, durable powers of attorney and health care powers
- ☐ Living trusts

(Updates/Amendments only for anything previously given to us.)

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