

IMPORTANT FINANCIAL DOCUMENTS CHECKLIST

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

Retirement Planning Documents

- Recent IRA. 401(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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